Document - Management

USER MANUAL

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This manual may be incomplete or contain errors despite our utmost care. We are not liable for errors or loss of data as a consequence of this.
Our software is continually being developed further. For this reason, new functions are not always described in the manual. But brief descriptions of these new functions are included in the continually updated README file.

Status 01/09

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Dr.DOC GmbH
Software from Germany

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INFORMATION REGARDING THE MANUAL

DIVISION

This manual contains all the details required to instal and to work with Dr.DOC®. The manual applies to use by a single user, in a conventional standardnet and in client/server operation. Modified or extended processes have to be executed for some functions for client/server (C/S). This will be indicated by a note at the respective places.

The content of the manual is structured as follows:

Introduction	This part explains the Dr.DOC® philosophy and provides information regarding legal issues to introduce document management.
Part 1	Technical Prerequisites, Installation
Part 2	includes basic information regarding the menu structure, the screen-setup, the keyboard and mouse control as well as a quick introduction with the help of the sample archive
Part 3	shows you how to work effectively with Dr.DOC®. The individual topics are usually introduced with some brief details, followed by the specific workflow. Topical examples and supplementary hints illustrate the work options
Part 4	helps you to set up an archive step by step and to carry out a wide variety of basic settings. As a system administrator you will also find important information regarding the client/server operation here.
Appendix	includes a glossary, error messages and their treatment as well as a comprehensive index.

The following subdivisions are helpful for extensive topics:

BRIEF INFO

⇨ initial basic subject information and a brief overview of the workflows

STEP BY STEP

⇨ the specific workflow

EXAMPLE

⇨ specific examples for the respective operation

TIP

⇨ ongoing information and suggestions regarding the subject.

CONVENTIONS

In general, the following spellings are used in this manual:

- Names of commands or menu items, which are selected:
  e.g. "OK"

- Commands, which are executed with one or several keys:
  e.g. **Ctrl** + **F4**

- Text, which has to be entered or which can be entered:
  e.g. install c:\drdoc

- Variables for another text, which must be entered:
  e.g. *file name.*

- Additional information especially for client/server applications:
  C/S

- Links to other subject information in other chapters of the manual:
  ↳ FURTHER INFORMATION ..
  - ...

IMPORTANT TERMS

Some terms are frequently used in the manual. Therefore we have provided some brief explanations of these terms. Links to explanations of other terms are referring to this list or to the comprehensive glossary in the appendix.

Archive
An application within the Dr.DOC®program, for example a collection of written documents and the respective available process potential, e.g. a word processing interface. An archive does not necessarily have to contain documents - it may also be used as a simple database, e.g. for address data.

Client/Server
A special type of network mode, which enables fully parallel working. The installation chapter includes explanations and recommendations regarding various application options.

Record
Saved → profile data with or without document. An → archive consists of a certain number of data records.

Document
Administrative object consisting of →administrative data and →CI/NCI data.

Field
The → pofile data is entered into input mask fields, which can be unreservedly determined. There are single-line fields, so-called continuous fields (for continuous text; d.i. memo field) and tables (e.g. for a distributor).

Tab
On screen the → fields are arranged in tabs.

Mask
The grouping of → fields and → tabs on the screen.

Profile data
Descriptive part of a record for entering mostly ordering features, for example reference, subject, person responsible etc. for easy retrieval of the document.

Thesaurus
"dictionary" of possible entries in the →profile data fields.

INTRODUCTION

The following section provides some introductory information:

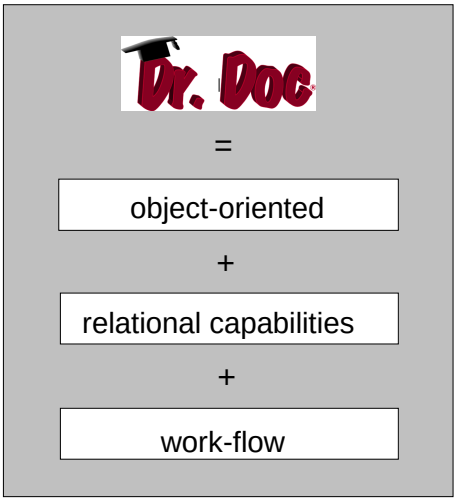
Dr.DOC® and its philosophy

Legal status

WHAT IS DR.DOC®?

Dr.DOC® could simplistically be called a very efficient database, which offers more than just simple data management. Dr.DOC® manages illustrations (so-called NCI documents) and "active" documents, e.g. CAD drawings, tables of a table calculation or formatted, coded wordprocessing files (so-called CI documents). In addition, Dr.DOC® also manages the associated programs and offers workflow components for workflow automations.

Dr.DOC® is a hybrid system, which combines the advantages of object-orientated and relational systems.



With which programs does Dr.DOC® work together?
Dr.DOC® works with all application programs, so the user can carry on working in the familiar program environment. During the archiving process the documents are given a note (program app) indicating with which program they are associated. When the document is called again, it is automatically opened in the associated program and can be edited immediately without the user having to know the path or program name.

PHILOSOPHY OF Dr.DOC®

With Dr.DOC® a revolutionary document management concept has been realised. The following describes the basic ideas on which the development of Dr.DOC® is based.

What is the actual situation?
In the individual operational fields, many varied types of data are accrued ranging from personnel data to written documents and all kinds of supporting documents, which have to be recorded.
A wide variety of programs are then used to log and/or to process this data, ranging from wage and salary programs to wordprocessing and invoicing or bookkeeping programs.
In addition, there is progressive decentralisation in the area of data processing. The decentralisation does not reduce the overwhelming quantity of data, but with continual acceleration moves it over to the user. As a result, the user is increasingly confronted with the management of data s/he produced.

Where is the problem?
An individual file or a handful of files can surely still be managed by data processing without any additional assistance. But as soon as the papers leaving the company are archived on disks and only the competent clerical staff knows which document was archived on which disk and in which format, any senior officer soon realises, e.g. when the clerical staff goes on holiday, how much s/he is already affected by these problems, when s/he cannot find anything.

How can the situation be improved?
A management software, which can facilitate as many of the accrued tasks while at the same spending the minimum amount on the familiarisation process, is required.

Performance characteristic "User friendliness"
The most important performance characteristic of a modern program is by far its user friendliness. Because through the related acceptance increase, a system's yield and thus its profitability can be increased.
User friendliness can be defined in the following way:

User friendliness = reducing complexity

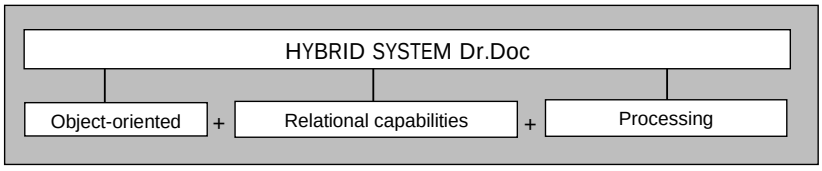
For example, an executive officer works in certain sectors of his comprehensive field: he maintains addresses, writes a letter and afterwards deals with data security and other work. The more of these sectors are included in his field, the more frictional loss is caused each time when a sector is changed. It must therefore be the task of any software to prevent these losses and to reduce the complexity for the user.

Which data management concepts exist?
The key to reduce complexity is in the organisational structure of the data and the correnspondingaccess philosphy, the so-called databasing. There are two relevant basic types of these data management concepts:

- ⇨ hierarchical, strictly relational systems
- ⇨ object-orientated systems

Simple object-orientated systems in the sense assumed here, do not have the disadvantages of strictly relational systems regarding the complexity of data maintenance; on the other hand they have no functional capacity for overcoming sectoring (separation of the various fields). While hierarchical, strictly relational systems administer individual records in a very complicated manner, they are capable of linking different archives very well; this is exactly the other way round for normal object-orientated systems: Managing the individual record is very easy here, but the simple connection between the different archives is not guaranteed.

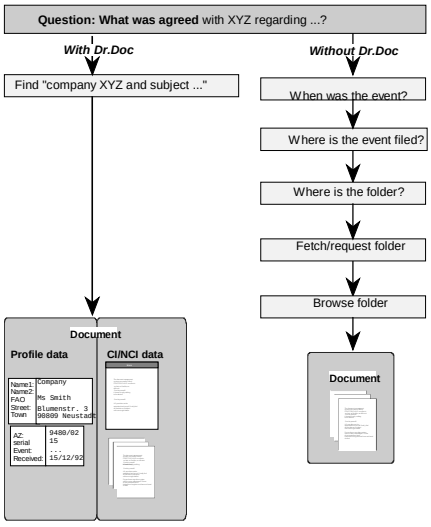
What is the solution?
In Dr.DOC®object-orientated technologies are linked with relational system characteristics. This hybrid system meets all the described requirements of a DMS and a data warehouse system.



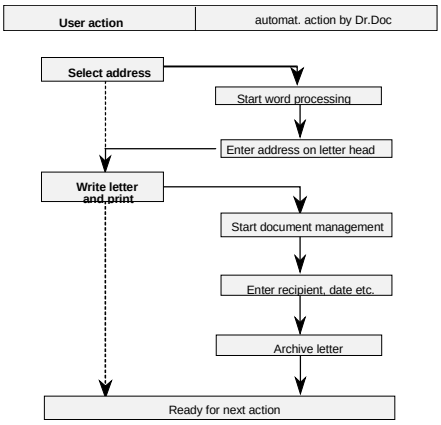
First of all, Dr.DOC® is like other programs, which manage data, documents and programs at the same time and also make provisions for future needs, i.e. is object-orientated. This is the only way of guaranteeing the required flexibility per se.
Relational or associative capabilities are also integrated in Dr.DOC®, which help to overcome the problem of sectoring with a hyperlink.
In addition, the user also has the advantage of not having to work strictly hierarchically due to the link of object-orientated work and relational capabilities.

That is very advantageous in particularly for the user when carrying out searches "quer" for possible hierarchies, as the search query can be formulated much easier and the search generally also proceeds considerably faster.
The third component ist the so-called workflow capability, under which it is intended to assume workflow editing in the widest sense in this case.
Based on these characteristics, it is possible to work with Dr.DOC® in an object-related or a project-related manner.

How does the management change when Dr.DOC®is used?
Dr.DOC® can ensure a logical, comprehensive workflow. This should of course ultimately also be implemented organisationally, e.g. by keeping a document (as far as is permitted by law) only in electronic format on the system.
When a document is required again, the executive officer can make a purely project and subject-related query without having to deal with the location of the file, the program with which it has to be called or the folder in which the concerning information can be found:

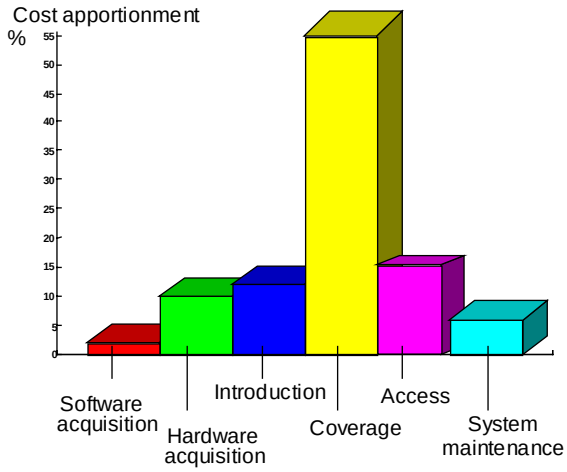


In addition, all previous management workflows should be checked under the aspect of Dr.DOC®**'s diverse options. In many cases Dr.DOC®** can help you to design workflows more efficiently than before.

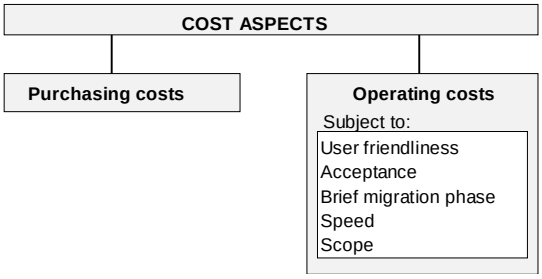

User action
automat. action by Dr.Doc
Select address
Start word processing
Enter address on letter head
Write letter and print
Start document management
Enter recipient, date etc.
Archive letter
Ready for next action

When is Dr.DOC® particularly efficient?
Dr.DOC® can be used as a hybrid data managent system in all work areas where electronic data is gathered. The profitability is usually highest, when Dr.DOC® is used in as many areas as possible.

Dr.DOC® helps to decrease operational costs. When using or implementing a data management system, the acquisition cost for software and hardware is only a small part of the total costs accrued.



The largest part of the overheads are accrued through the registration costs for the documents.



By efficiently using Dr.DOC® in many operational fields and by designing an efficient work station these operating costs can also be kept comparably low.

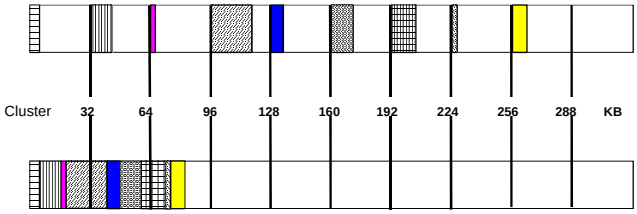
Part of a "holistic" software like Dr.DOC® is a holistic management frame in technical as well as in "workstationphilosophical" respect. Dr.DOC® should be seen as a central component of the operational infrastructure, as motive and instrument for optimising business processes. Dr.DOC® is only a filing system to a certain degree, it is more of a "retrieval" and "transport" system.

How are the documents filed?
Dr.DOC® is a container based system. That means: In contrast to file based systems, container based systems only require the memory space for the actual size of the documents.

Example

FILEbased:
Total
memory required:
264 KB

CONTAINERbased:
Total
memory required:
85 KB



In a container based system practically all documents are put into a large container, which portrays itself as a file for the operating system. This filing principle permits any size of archives independent of the operating system.

Another advantage is that a container based system like Dr.DOC® can carry out sequential searches considerably more efficiently and therefore requires no index trees for full text retrieval and thus no memory relating to this. And finally, increased data security is thus also guaranteed: The documents can only be called via the archive (which can additionally be secured through differentiated access rights). The call or the manipulation of a document via a file manager is excluded.

LEGAL STATUS

The commercial code, the code of civil procedure, the fiscal code and the generally accepted accounting principles regulate the filing of all electronically archived data and the corresponding access controls. The Federal Data Protection Act regulates the access controls and the maintenance of person-related data even more strictly.

Storage in accordance with commercial and fiscal law

The legislator in Germany only stipulates that every businessman is obligated to keep books. The legislator does not stipulate any technology regarding the type of data storage, the legislator only makes certain process requirements:

- proper transformation
- proper storage
- proper reproduction

The transfer from one medium to one of the same kind or to a different one is called **transformation**. This transformation is in due form, if the storage process is permissible, the transformation is complete, correct and comprehensible and if the method is defined. The process must be documented and verifiable. Therefore it must also be possible to determine who has archived which documents. This can either be ensured organisationally or more simply via the corresponding functions of the document management system (DMS).

The **storage** is in due form, if the data remains complete and stable during the period of storage, the storage is ordered and the data is available at any time and can be read again in adequate time. The data should therefore only be archived on data media (WORM, CD) that is not rewrite-able, as the stability is thus guaranteed per se. It is completely up to the user which order pattern is realised with the help of the DMS, from a legal point of view every verifiable fixed order is an order.

The **reproduction** must be readable and must be correct visually and/or correct in its contents to be called in due form.

In addition, the commercial code and the fiscal code prescribe that a number of document types, e.g. letters, consignment notes and accounting records, must be reproduced visually, for the other documents a reproduction in substance is sufficient. Documents, which have to be reproduced visually, as a CI document, e.g. as a word processing document, can also be stored, if a visually identical

printout can be reproduced using word processing functions (and that is obviously the case for documents that were created internally).

Opening balances, annual accounts, group accounts and supporting documents in connection with turnover tax on imports, i.e. customs documents, are excluded from being archived purely electronically. These documents must also be available in paper format.

To meet the stated requirements, it is necessary to stipulate the entire process flow in writing. This also includes data localisation, data security and error handling.

Dr.DOC® meets the described requirements in accordance with the commercial code, code of civil procedure, fiscal code and the generally accepted accounting principals and can thus be used for purposes pursuant to commercial and fiscal law.
The longterm service life of data media, which is often guaranteed for 30 years, is of high quality. Nevertheless a second provision of security should not be forgotten because of the danger of theft and fire.

Note

If you want to or have to familiarise yourself in more detail with the subject "obligation to preserve and record retention periods", we recommend specialist literature as regards this, e.g. by the "Working group for commercial administration (registered society) - AWV", Eschborn.

PART 1

The following chapters include

Information on technical specifications

Installation instructions

TECHNICAL SPECIFICATIONS

To work with Dr.DOC® you require the following components:

❍ Client or single user hardware:
PC (32 BIT)
Memory:
- at least 16 MB RAM (64 MB RAM recommended)
- if using the OCR module: at least 64 MB RAM

CD drive (for installing Dr.DOC®)
3.5 disk drive"
Hard disk

❍ Archive server hardware:
PC (32 BIT)
Memory: at least 64MB RAM, subject to operating system and problem
CD drive (for installing Dr.DOC®)
3.5 disk drive"
Hard disk

❍ Operating system:
Windows 95,´98, Windows NT or Windows 2000
in **Dr.DOC®** N:
for separate archive/network server:
- Network server: **any**
- Archive server and clients:PC operating system (see above)

❍ Mouse:
With MS-Windows compatible mouse.

❍ Printer:
Any printer supported by MS-Windows.

❍ Scanner:
Any scanner, which is controllable via Kofax or TWAIN.

❍ Graphics support:
Any graphics cards and screens supported by the operating system.

- Computer storage:
  - any storage medium, e.g. disk systems: CD, MO, WORM, jukeboxes.

- Miscellaneous:
  - Application programs of all types
  - for transferring data to other programs: Programs with Macro language, e.g. word processing (e.g. Word for Windows) or similar.
    You will need Word for Windows 6.0, ´95 (7.0), ´97 (8.0) or 2000 (9.0) for the transfer data Macro supplied as standard.
    In addition, appropriate macros to transfer data can be created in all programs with Macro language.

INSTALLATION

You can use Dr.DOC® in various variations:

- **Single user:**
  When used as single usersystem the program only runs on a computer locally independent of any net that may exist. It cannot be accessed by other workstations.

- **Network:**
  Use Dr.DOC® in the network to enable several users fully parallel access to the same archives. There are two possibilities:

  Standard net:
  The data is kept centrally on a net server. A considerable disadvantage is the extra burden on the network up to 1000 times. The use as standard net should only be selected, if the client/server operation is not possible for hardware technical reasons.

  Client/Server:
  The use as C/S system is preferable to the standard net. The burden on the network, which is kept as low as possible, as well as increased access protection and more data security are important criteria.

1. INSTALLATION SINGLE USER VERSION

(1) To install Dr.DOC® insert the Dr.DOC® CD into the CD drive.

(2) If the installation program does not start automatically, proceed as follows:

either select the CD drive in Explorer and double click the file "Setup.exe"

or press the "Start"button and call the command "Execute...". Click on the "browse"button in the "Execute" dialogue and select the "Setup.exe" file in the CD drive and click on the "Open"button. Now start the installation process with "OK"in the "Execute"dialogue.

(3) The Dr. DOC Setup will be started. You can select the required language in the first window

(4) Dr. DOC Setup main options: Select **"Install Dr.DOC...“**

(5) Install Dr.DOC: Select "Dr.DOC single user version" and confirm this dialogue with "ok“

(6) Welcome to the Dr. DOC®installation program: Confirm this dialogue with "OK".

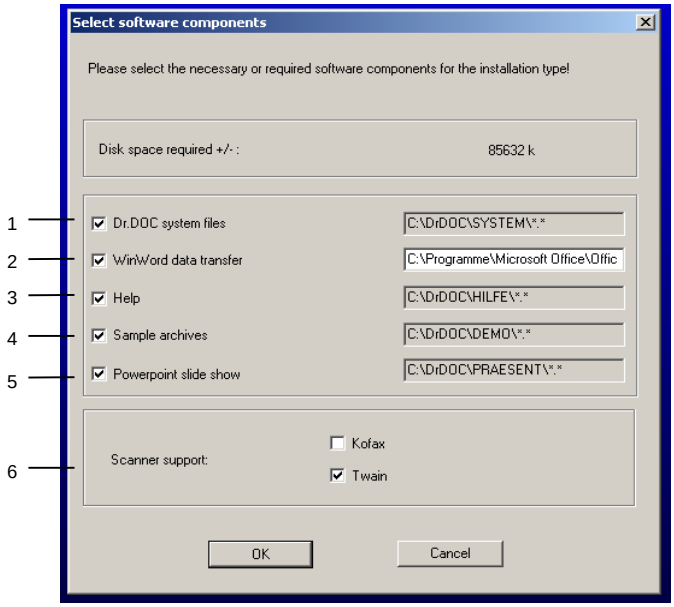
(7) Software license agreement: Read this agreement carefully and confirm that you agree with the software license agreement with "OK".

(8) Select destination directory: The path for the destination directory where Dr.DOC® will be installed is defined here. We recommend the path C:\drdoc. With this path you can use the supplied standard letter templates "brief.for“ directly to bring in data from the address management (demo-archive supplied on CD) to Winword. If you install **Dr.Doc**® in a different destination directory, please note that the path for the data source and for the control file must be adapted in the Winword standard letter template.

(9) Selecting the software components: Select the software components you want to install the following dialogue.

Attention! Important update note!!!

DO NOT install the sample archives, if you are already using these for archiving your important data and documents. (When the sample archives are being installed, the existing data is overwritten).



1. ®Dr.DOC system files: Program and system files of Dr.DOC®. (Click on this item to install Dr.DOC®)
2. WinWord data transfer: select when you want to transfer data from Dr.DOC® to Winword standard word documents.
3. Help: Dr.DOC® offers an extensive help function, which can be edited (recommended).
4. Sample archives: To familiarise yourself with Dr.DOC®, you can install sample archives including address management and document management, (recommended for first installation).
5. Powerpoint Presentation: A self-running presentation, which introduces the most important functions of Dr.DOC® .
6. Scanner support: If you are using a scanner, state whether it is controlled via a Twain or via a Kofax driver.

Note

1.) If you have problems with the internal Twain driver of your scanner, please refer to the enclosed installation notes. If required, check the demo-driver under www.cfm.de.

2.) The directories, in which the individual components are installed, can be modified if required. We recommend to apply the suggested Dr.DOC directories.

(10) The following "Note“ will appear, if you install the "WinWord data transfer“ component:

Please check your items in "document association“ when next working with DrDOC:
(call via the menu bar:
Settings / document association)

Please replace any existing item

WINWORD,DOC,[DrDocTv],[DrDoc.Openfile“%s“],[DrDocNew]

with

WINWORD,DOC,[DrDocTv.main()],[DrDoc.WEITERSUCHE“%s“],[DrDocNew.main()]

Confirm this note with "ok“ and check after exiting the installation.

The installation will now be executed.

(11) Install program symbols?: Select whether you want to add the Dr.DOC® program symbol to the start menu.

If you are working with MS-Office ´97 or later versions, the installation is now completed. The Winword macros are installed with the template file drdoc.dot. In older versions the macros are installed as follows:

(12) Winword macros installation

- Word processing macro: Determine whether the Winword macros for transferring data are to be installed now:
- If you have answered the question with "Yes", Winword will be automatically started and the document drdocmak.doc will be opened. If you receive a Word query asking whether the document should be opened without macros, be sure to select "No".

- The window "Transfer data macro Dr.DOC®" contains some basic information on transferring data
- Set path details: The local working directory is "c:\drdoc\tmp" as standard. We recommend that it is adopted.
- When the installation of macros is completed, please ensure you close the Winword program again to complete the Dr.DOC® installation.

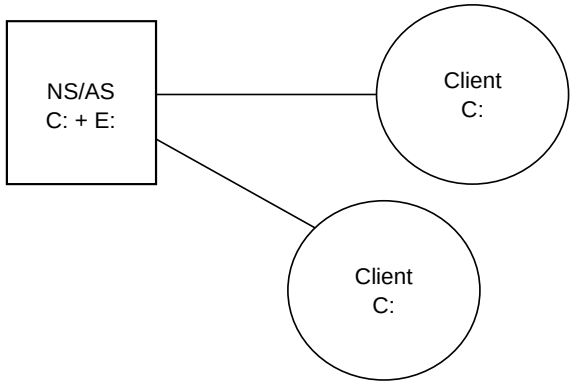
(13) Completing the **Dr.DOC®**installation:
Successful installation is completed with a corresponding message. Restart Windows when prompted.

2. INSTALLATION CLIENT/SERVER

Basics

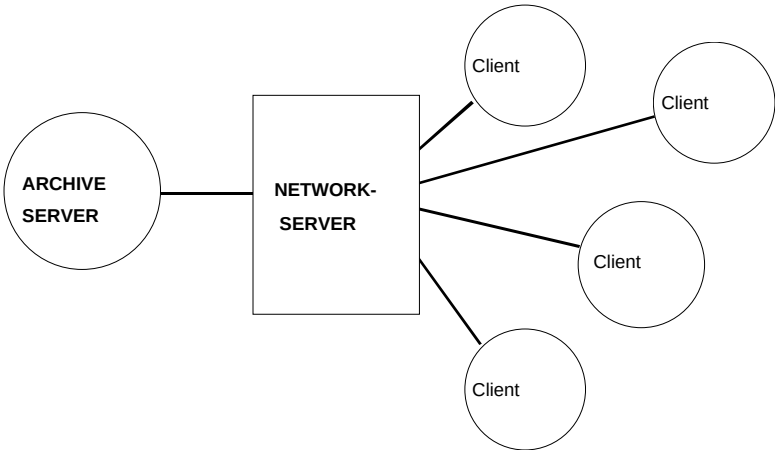
There are two possiblities for the configuration of network server, archive server and clients. The configuration (B) is recommended to ensure optimum performance and data security.

(A) The network server and the archive server are on the same computer:



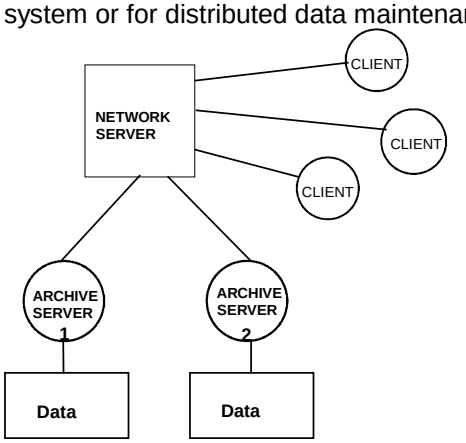
This configuration is only purposeful, if you do not have your own computer as an archive server, if the network server has sufficient memory capacity and if it is not already used to capacity. This mode is not possible in Novell nets.

(B) Recommended configuration:
The archive server is a network client:



The data security is considerably easier to guarantee with this optimum configuration. The archive server is <u>not</u> released for direct access, the clients only have access via the WIN sockets function and thus only within the Dr.DOC® program.
Thus manipulation of data outside of Dr.DOC® is ruled out (this security can be increased even more, if the computer is put in a locked room). Within Dr.DOC® the data can also be very well protected through the differenciated user set with access rights that can be defined freely.

In addition, further server processes for an abundant, failure-safe and scalable system or for distributed data maintenance can be used.



Installation

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(2) If the installation program does not start automatically, proceed as follows:

either select the CD drive in Explorer and double click the file "Setup.exe"

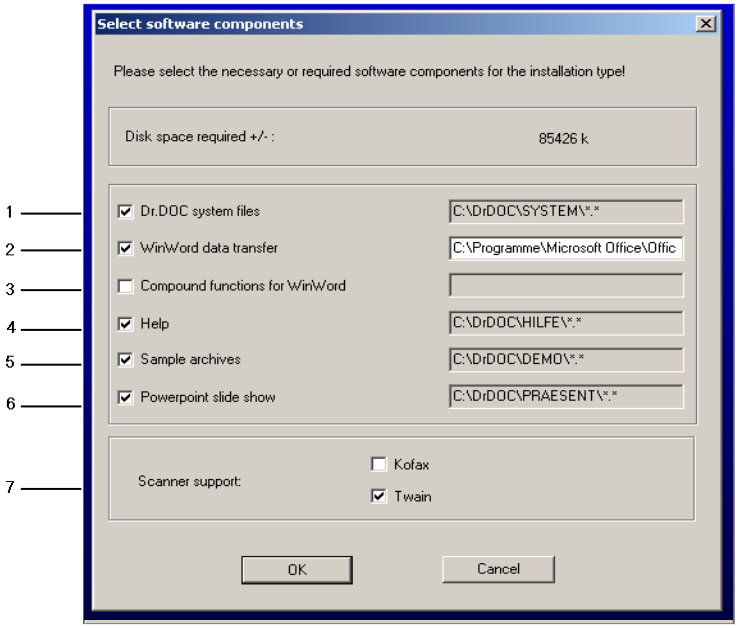
or press the "Start"button and call the command "Execute...". Click on the "browse"button in the "Execute" dialogue and select the "Setup.exe" file in the CD drive and click on the "Open"button. Now start the installation process with "OK"in the "Execute"dialogue.

(3) The Dr. DOC Setup will be started. You can select the required language in the first window
(4) Dr. DOC Setup main options: Select **"Install Dr.DOC...“**
(5) To install the net version select the relevant line, select the number of users and confirm with "ok“. You require two "keys" for a N2 license (you will receive these with the delivery note when ordering a N2 license). For N5 and higher you require the relevant dongle, which you clip onto the archive server's parallel port.

(6) Welcome to the **Dr. DOC®**installation program: Confirm this dialogue with "OK".
(7) Software license agreement: Read this agreement carefully and confirm that you agree with the software license agreement with "OK".
(7a) For a N2 version, the two "keys“ will now be queried, enter these ***without*** blanks and confirm with "ok“ (for better legibility we supply the keys with a blank after every third character)
(7b) Select the type of installation:
Select which task the computer to be installed is intended to have. Whether it is used as "Client“ or as "Archive server".

2.1 Installation Archive Server:

(7b) Select the "Archive Server“ item and confirm with "ok“
(8) Select destination directory: The path for the destination directory where Dr.DOC® will be installed, is defined here. We recommend the path C:\drdoc.
(9) Selecting the software components: Select the software components you want to install in this dialogue.



1. ®Dr.DOC system files: Program and system files of Dr.DOC®. *This item must be clicked to install Dr.DOC®*
2. WinWord data transfer: *Deactivate to install the archive server*
3. Compound functions for Winword: *Deactivate to install the archive server*
4. Help: Dr.DOC® offers an extensive help function, which can be edited: *Recommended component*
5. Sample archives: *Deactivate to install the archive server*
6. Powerpoint Presentation: A self-running presentation, which introduces the most important functions of Dr.DOC® ; *Deactivate to install the archive server*
7. Scanner support: If you are using a scanner, state whether it is controlled via a Twain or via a Kofax driver; *deactivate to install the archive server*.

(10) The following "Note“ will appear, if you install the "WinWord data transfer“ component:

Please check your items in "document association“ when next working with DrDOC:
(call via the menu bar:
Settings / document association)

Please replace any existing item
WINWORD,DOC,[DrDocTv],[DrDoc.Openfile“%s“],[DrDocNew]
with
WINWORD,DOC,[DrDocTv.main()],[DrDoc.WEITERSUCHE“%s“],[DrDocNew.main()]
Confirm this note with "ok“ and check after exiting the installation.

The installation will now be executed.

(11) Install program symbols?: Select whether you want to add the Dr.DOC® program symbol to the start menu.

(12) Completing the **Dr.DOC®** installation:
Successful installation is completed with a corresponding message. Restart Windows when prompted.

(13) The configuration of the **Dr.Doc®** server process icon must be as follows:

print to: <*path*>\docserv.exe <*path*>\<*name of the user set*>.bvd <*path for Dr.Doc® communication directory*>

Note!

The archive and the user set must be created on the archive server before the server process is started for the first time!
Start the drdoc.exe program (in the "drdoc/system“-directory) on the archive server

SUBJECT INFORMATION:

"SET UP ARCHIVE“ SEE CHAPTER 14

"USER SET“ SEE CHAPTER 16

2.2 Client installation:

Basics:

There are principally two possibilities for setting up the Dr.DOC®clients:

(A) Central program and help setup
The program with all files and applications must be made available centrally on the archive server or on the network drive.
To set up the client, **Dr.Doc**® must be installed locally once. Afterwards the local directory "drdoc/system“ is removed again.

(B) Local part setup of program and help
In addition, the program and/or online help is locally at the archive client. The local installation of the program on the client is necessary, if the clients are equipped with different operating systems.

When configuring the **Dr.Doc**® client icon, you must refer to "drdoc.exe“.

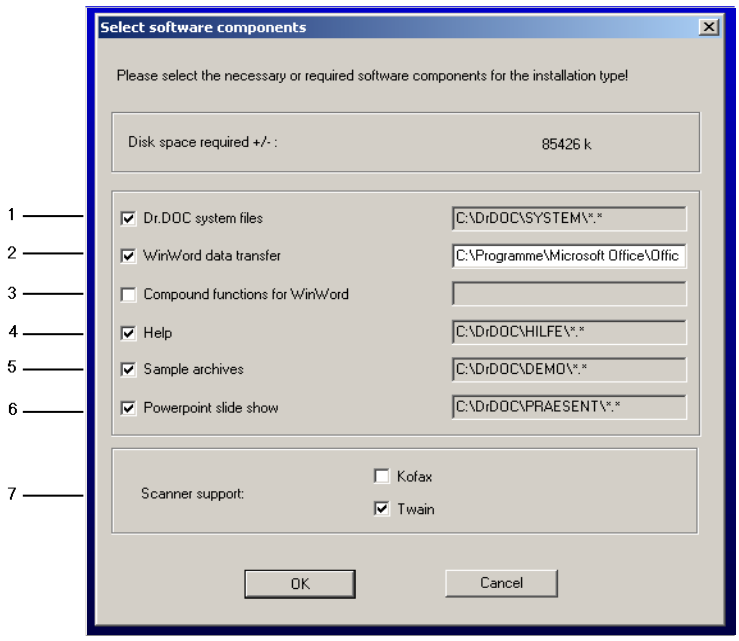
Installation:

Starting the setup at the client as described in the installation under 2.1 of **(1)**-**(7a)**
"Setup of the archive server“. Afterwards proceed as follows.

(7b) Select the type of installation: Select the task the computer to be installed is intended to have. Select "Client" and confirm with "ok".

(8) Select destination directory: The path for the destination directory where Dr.DOC® will be installed, is defined here. We recommend the path C:\drdoc, if **Dr.Doc**® is to be installed locally.

(9) Selecting the software components: Select the software components you want to install in this dialogue.



1. ®Dr.DOC system files: Program and system files of Dr.DOC®. *This item must be clicked to install Dr.DOC®*
2. WinWord data transfer: *If this function is required, it must be activated for the client installation*
3. Compound functions for Winword: *Possible option for client installation*
4. Help: Dr.DOC® offers an extensive help function, which can be edited: *recommended*
5. Sample archives: *Deactivate to install the client*
6. Powerpoint Presentation: A self-running presentation, which introduces the most important functions of Dr.DOC® ; *Possible option for client installation*
7. Scanner support: If you are using a scanner, state whether it is controlled via a Twain or via a Kofax driver; *activate at scanner key stations*

(10) The following "Note“ will appear, if you install the "WinWord data transfer“ component:

Please check your items in "document association“ when next working with DrDOC:
(call via the menu bar:

Settings / document association)

Please replace any existing item

WINWORD,DOC,[DrDocTv],[DrDoc.Openfile“%s“],[DrDocNew]

with

WINWORD,DOC,[DrDocTv.main()],[DrDoc.WEITERSUCHE“%s“],[DrDocNew.main()]

Confirm this note with "ok“ and check after exiting the installation.

The installation will now be executed.

(11) Install program symbols?: Select whether you want to add the Dr.DOC® program symbol to the start menu.

(12) Completing the **Dr.DOC®**installation:
Successful installation is completed with a corresponding message. Restart Windows when prompted.

(13) Start **Dr.Doc**® 6.0 and log on via "Archive/user login“(enter host name or IP address of the archive server and log on name with password). Afterwards select an archive (menu item "Archive/select“).

Note! The archives and the user set must have been created on the archive server before the *first* log in action at the client! In addition, the **Dr.Doc**® -server process must have been started on the archive server.

(14) Exit **Dr.Doc**® and save the settings.

(15) Optional configuration of the **Dr.Doc**® client icon

- Direct archive call via IP address or host name
  - Minimum configuration:

    <*Path*>\drdoc.exe <*host or IP address of the archive server*> <*Port No*.> <*archive name*>
  - Extended configuration:

    <*Path*>\drdoc.exe <*host or IP address of the archive server*> <*Port No*.> <*archive name*> <*path*>\whilfe <*host or IP address of the archive server*>\ <*Name of Dr.Doc*®*user set*>.bvd

(16) When **Dr.Doc**® is called next time, the log on dialogue will appear automatically.

▶ transforming sample archives into C/S applications:

If you have installed the sample archives locally on the archive server and want to make them available to all clients, carry out the transformation for every archive as described in chapter 24.

▶ transformation of local online help into central application:

If you want to make the online help available centrally to all clients, carry out the transformation as described in chapter 24.

3. INSTALLATION IN THE STANDARD NETWORK

You want to set up Dr.DOC® in the network to enable several users access to the various archives. So the archives are centrally on the server. The program can either also be central (prerequisite: all connected workstations have the same operating system) or it can be installed locally on every workstation.

The installation for the default network operation is always done from one workstation. Carry out the following action:

1. Place the Dr.DOC® diskette labelled "Disk1" or the Dr.DOC® CD into the corresponding drive.

2. Start your operating system, select the CD or disk drive in Explorer and double click on the "setup.exe" file.

   OR:
   Start your operating system, select the START button in Explorer, call "Execute" and enter the following in the "Execute" window: *drive*\setup
   drive stands for the name of your drive. (e.g. a:)

3. Follow the detailed installation instructions and answer the queries according to your requirements.

Also take a look at the enclosed supplementary "installation notes".

UPDATE INFORMATION

If you have already worked with Dr.DOC® 4.x, the existing data, fields and forms will be adopted.

A reorganisation is carried out - after a corresponding message - to adapt the data.

Note If required, follow the enclosed separate update information!

CHANGES FROM EARLIER VERSIONS

If you have already worked with previous versions, the following will give you an overview about important new additions and changes.
But even if you have never worked with Dr.DOC® before, this information may be interesting as an initial insight.

☒ WIN sockets – C/S - communication

- Based on Internet standard: TCP/IP protocol
- Increased performance and security:
  user set, database configuration files and communication folders are no longer accessible by the client at Explorer level.
- Client only requires host name or IP address, port number and archive name for communication
- Efficient administration
- Simplified archive structure

☒ Automatic generation of new document containers:

- The container size can be set up to a maximum of 2 gb.
  The default size is 600MB, this allows simple swapping of containers on CD
- When the predefined container size is reached, a new container is automatically created;
- Forming a container pool with firmly predefined container structure is possible

☒ Tree view

- User friendliness is increased with a clearer program interface.
- The **Dr. DOC**® program window is divided into three parts for clear data and document presentation
  1. Tree view or virtual filing/folder structure
  2. Tabular select list
  3. detailled record view

☒ New Twain module:

- The current TWAIN standard 1.8 driver (CFM-TWAIN driver V.5.2) is supported
- Thus achieving increased compatibility with a variety of scanner types

☒ New scan module:

- New OCR and barcode module
  has been integrated
- The following barcodes are recognized: Check Code 39, Check Interleaved 25, Code 128, Code 39, EAN 13, EAN 8 and Interleaved 25
- New function "Barcode as document separator“
- In "batch mode“: the barcode can be used as document separator for automatic archiving.
- Batch mode:
  - Processing files in batches: Registration of NCI documents with simultaneous OCR recognition possible
  - Processing files in batches: Multipage documents can be completely adopted

☒ Expanded e-mail interface:

- Compatible with MS Outlook, MS Outlook Express and Netscape Messenger
- Sending e-mails from Dr.DOC:
  - E-mail types: mail;
    MS Outlook in addition: task, appointment
  - Appendix: profile data, documents;
    MS Outlook: in addition: link (calling Dr.DOC document from MS Outlook e-mail)

☒ Automatic log in with NT log-in name:

- Length of the log-in name longer than 7 characters
- The network log-in can optionally be coordinated for all users or user-specific
  Adaption option for existing user set

☒ COLD viewer:

- TIFF and JEPEG in addition to BMP are now also allowed as document form image templates

☒ New data type "XD“ for "date *and* time:

☒ Field pre-valuation for new entry possible

☒ Workflow:
Apart from the previous "ad hoc" workflow (now renamed "transfer data") there is now also a complex workflow system with graphic workflow manager for controlling the document flow and for modelling workflows in companies.

Please find information about the comprehensive new workflow system in the separate instructions.

PART 2

The following section describes

how to gain an initial insight into Dr.DOC®

how to start and exit Dr.DOC®

how to call menus and activate commands

QUICK APPROACH

4. SAMPLE ARCHIVES: OVERVIEW

Before you start:

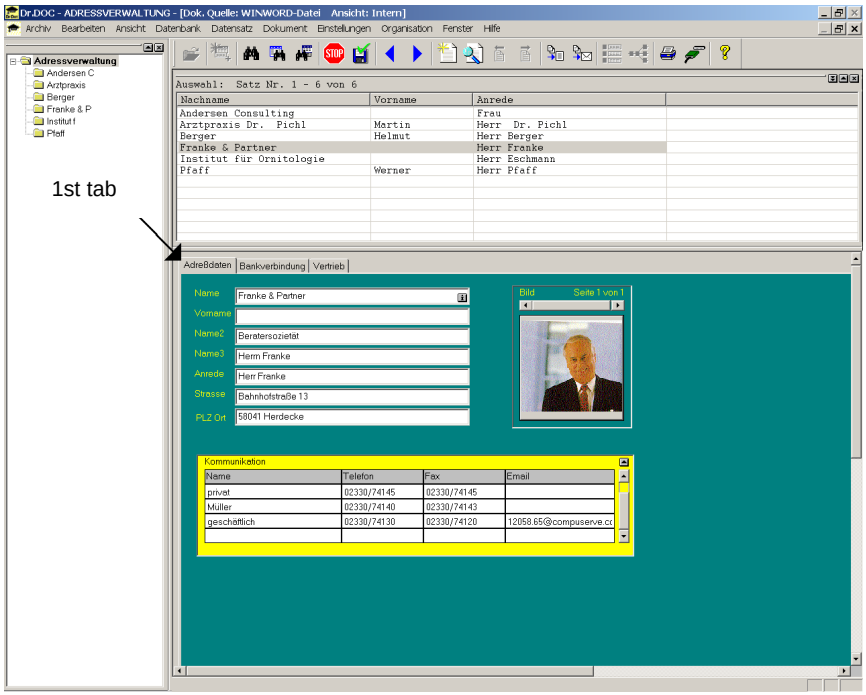
As you already know, Dr.Doc® allows you to create your own applications - databases, archives - according to your exact ideas. Some preproduced sample archives are available to facilitate your first attempts. You may keep these as they are or redesign them for your purposes.

The following is supplied:

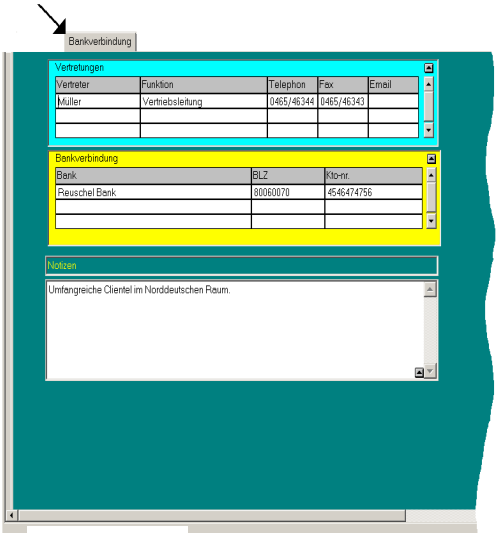
Address management	for addresses, bank details, photos, marketing information; with WinWord data transfer-standard letter document and subsequent archiving in document managment
File plan	as a Thesaurus for document management
Supporting documents archive	as a Thesaurus for document management and purchase/sales
User archive	for information on individual users; with additional information shortcut to address management
Library management	for bibliographic data, drawing up inventories, acquisition, lending out, Thesaurus for keywords
Image archive	for sample purposes for different documents
Purchase/Sales	With archiving of supporting documents, stock management, dunning; shortcut to address management as Thesaurus
Stock management	for merchandise stock; shortcut to address management as Thesaurus
Press archive	for bibliographic data, keywords, archiving newspaper articles etc.
Document management	for incomings/outgoings; with shortcut to address management

The most important and most used sample archives are **address management** and **document management**. The following chapter shows initial simple workflows based on these two archives.

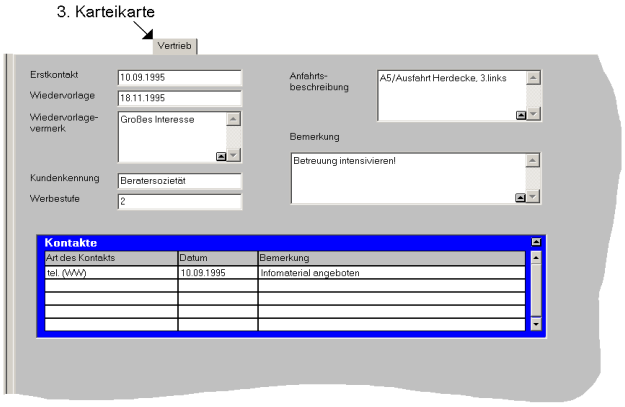
Address management:



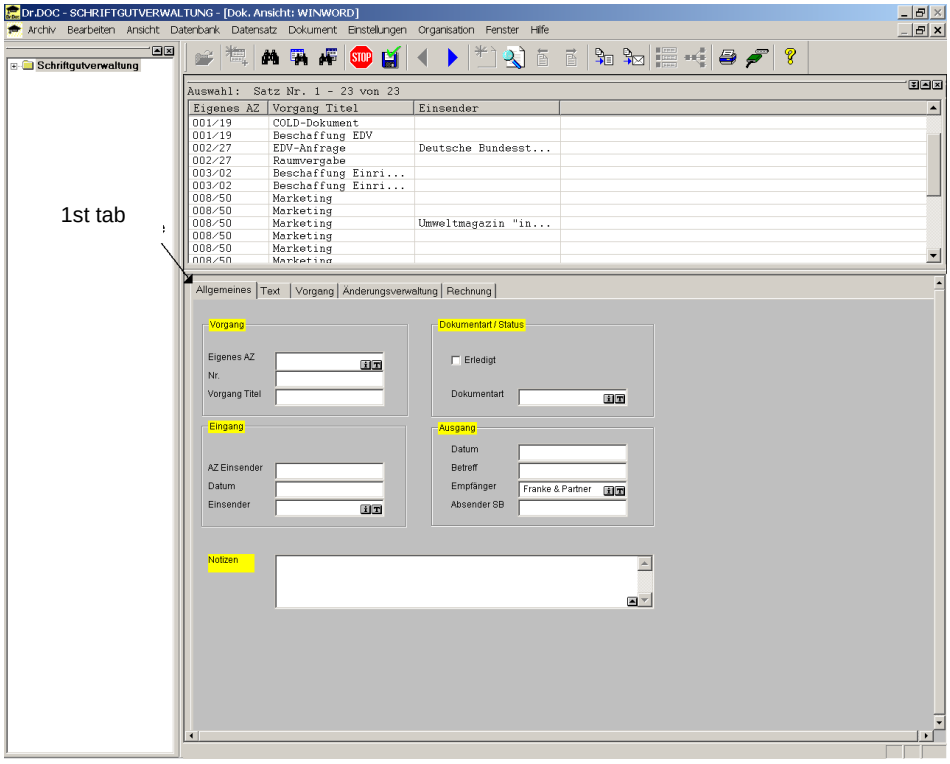
2nd tab



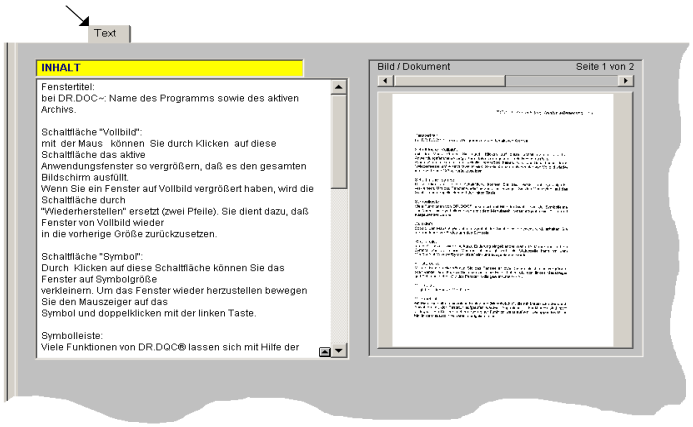
3rd tab



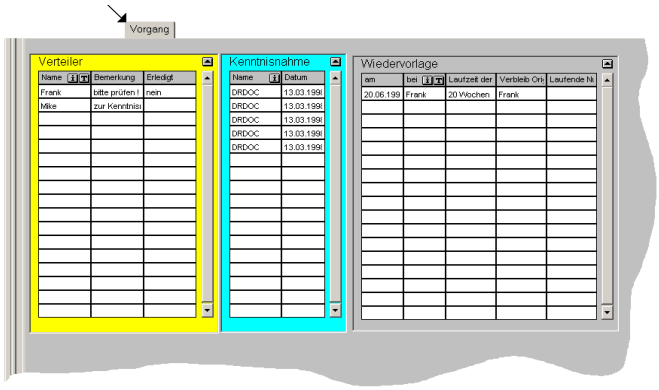
Document management:



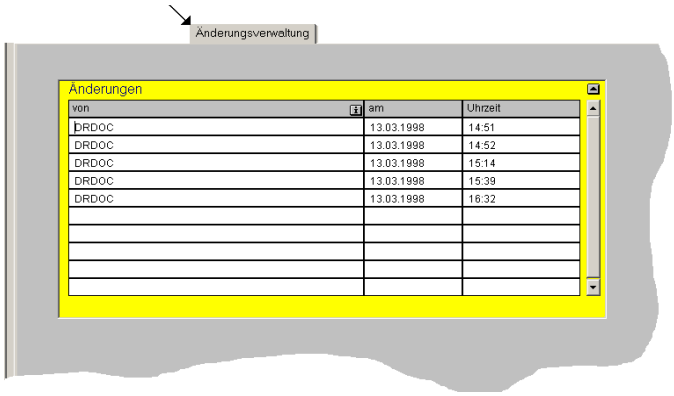
2nd tab


Text
INHALT
Fenstertitel:
bei DR.DOC~: Name des Programms sowie des aktiven Archivs.
Schaltfläche "Vollbild":
mit der Maus können Sie durch Klicken auf diese Schaltfläche das aktive Anwendungsfenster so vergrößern, daß es den gesamten Bildschirm ausfüllt.
Wenn Sie ein Fenster auf Vollbild vergrößert haben, wird die Schaltfläche durch "Wiederherstellen" ersetzt (zwei Pfeile). Sie dient dazu, daß Fenster von Vollbild wieder in die vorherige Größe zurückzusetzen.
Schaltfläche "Symbol":
Durch Klicken auf diese Schaltfläche können Sie das Fenster auf Symbolgröße verkleinern. Um das Fenster wieder herzustellen bewegen Sie den Mauszeiger auf das Symbol und doppelklicken mit der linken Taste.
Symbolleiste:
Viele Funktionen von DR.DOC® lassen sich mit Hilfe der
Bild / Dokument
Seite 1 von 2

3rd tab



4th tab



5. FIRST ATTEMPTS - SIMPLE WORKFLOWS

① ▶ Start Dr.Doc®:

Double-click the Dr.Doc® icon in the Windows program manager or select the symbol using the direction keys and invoke with **ENTER** or select the symbol on the programs start menu.

② ▶ Select archive:

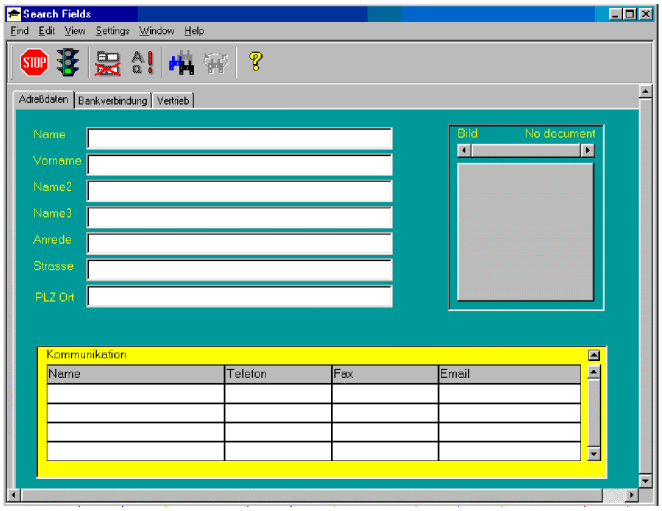
Menu item "archive / select" call:

Mark this entry
and confirm with "OK".

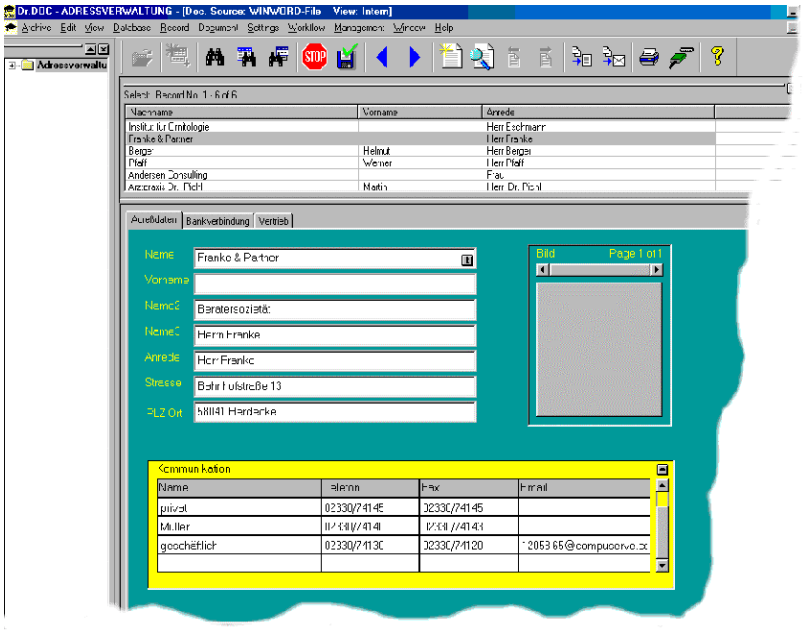
③ ▶ Find and retrieve:

Initially, find existing sample data to familiarise yourself with the address management:

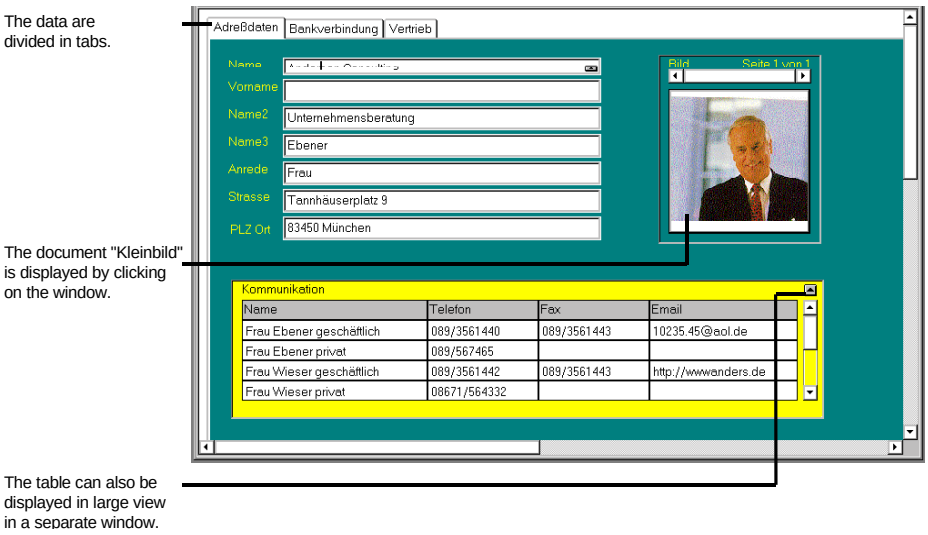
When you click on the "search fields"icon, the following dialogue form appears. Enter "*" in the "Name" line. You will receive all records containing an entry in this line, as the search result.



Start "find" with the key combination CTRL+S or the icon - a hit list will be displayed:

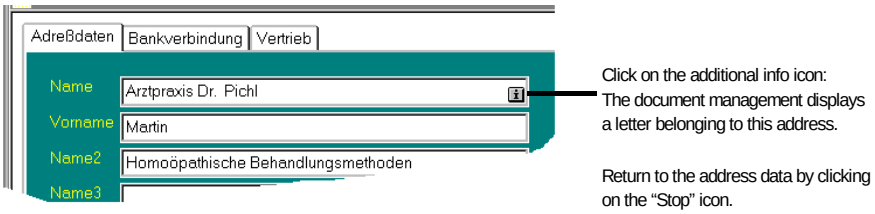


④ ▶ Checking data and working with data:



The data can now be edited. You will find an icon on the toolbar for the most essential functions to enable you to call up these functions quickly.

By clicking on the icons, you can browse the results. Carry on browsing until you get to the "Practice Dr. Pichl" record.



⑤ ▶ Enter new data:

Finish editing existing data by repeatedly clicking on the "Stop" icon until the Dr.Doc® start menu is displayed again.

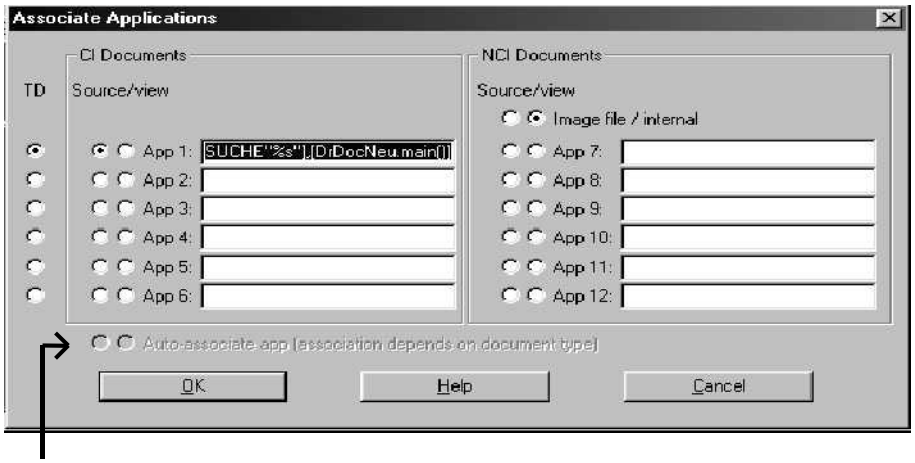
Then click on the "new entry" icon. Enter the address data of your choice in the new, blank form.

Save the record by clicking on the save icon; a new data record has been created. You can create more records or exit the function by clicking on the "Stop“ button.

It is best to test the archiving of new documents in **document management**.

Click on the "Stop" icon again until the Dr.Doc® start menu is displayed. Then call document management (as described under ②) . Initially try archiving any file:

Call the document association using the icon.



For source and view, mark the Autolink option and confirm with "OK".

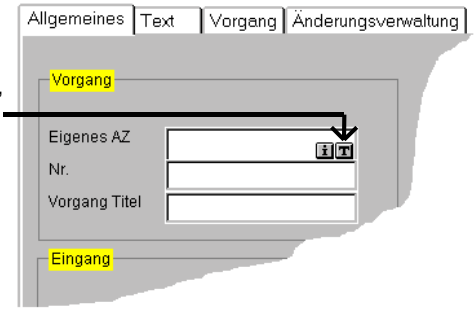
Also check the document source (menu item "Settings/Document source"): the "file" option must be selected.

After these preparations you can start with a new entry via "Database/New entry“ or the corresponding icon.

Start archiving the file now with "Document/New" or the corresponding icon.
Select the file you want to archive from the file-selection dialogue.

Afterwards enter the profile data of the document. To make this entry simpler:

IIf e.g. you click on "T" here, kyou obtain a list of file indicators to be taken over from the file plan



Enter further data as required and then save the record with the "save button“.

⑥ ► Redisplay, change and save record with document again:

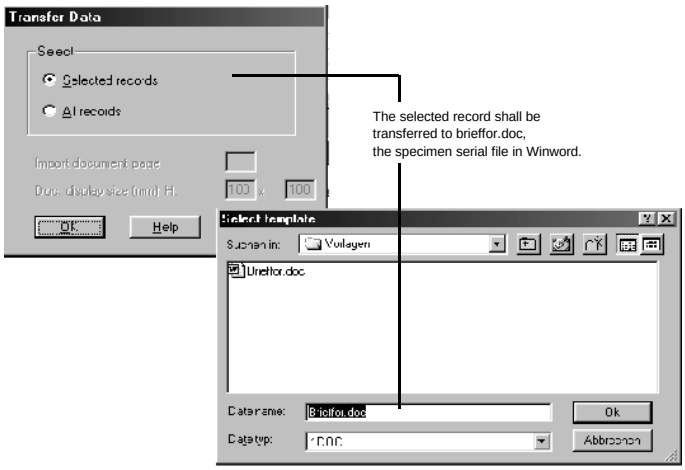
When you exit the new entry, you can retrieve the record again. To do this, call text retrieval. Enter any (partial) term of your record's profile data.
The following association characters are available:
„&“ for "and"
„|“ for "or"
( ) for logical delimitation
Do not allow any blanks between keywords and association characters. Start searching with "OK".
The record can now be viewed again. Click on the "Text" tab. The name of the program, where the document was created and where it can be viewed, appears in the window for the document. If you click on this document window, the corresponding program will be started and the document will be displayed. The document can now be changed. If the document was modified, save and close it. When you return to the **Dr.Doc**® screen, you will be asked whether you want to save the modified document. Confirm with "yes“ to also save the changes in **Dr.Doc**®.

This is only one example for archiving any type of document.

The document management is associated with the address management to automatically archive letters. WinWord – documents can be created from within address management. The following section describes this process.

⑦ ▶ Transfer data - create letter and archive:

Call address management again and find one or several records.
Then click on the "transfer data" icon.



The data is automatically imported. The content of the letter is not restricted. When the letter is finished - saved and is to be registered in **Dr.Doc**®, click on "Dr.DOC archiving“ (appears on the WinWord menu bar). If you want to save the letter prior to registration, simply click on the "Save“ button in Word. The letter is then automatically saved under the predetermined name in the predetermined directory.

After you have clicked on "Dr.DOC archiving“, you will automatically return to the **Dr.Doc**® document management. The name of the recipient is automatically entered in the relevant field. You can enter further profile data. To finish the process, click "Save".

To retrieve the letter - e.g. directly in document management - call document management and start the text retrieval. If you now also activate the "search in: documents" option you can search for any word from your letter.
To view the record and the document, follow the steps described above.

▶ Finally:

You have now met some of the basic principles of **Dr.Doc**® . The respective chapters of the manual describe in detail the procedures for individual workflows and include examples.

Basics

6. PREREQUISITES FOR WORKING WITH DR.DOC®

Before you work with Dr.DOC® you should familiarise yourself with the basic Windows operating sequences.

Knowledge of how to use the (individually different) programs, from which documents are intended to be archived, is mostly assumed. The basic work-flows for Winword are explained with examples, e.g. for transferring data to word processing.

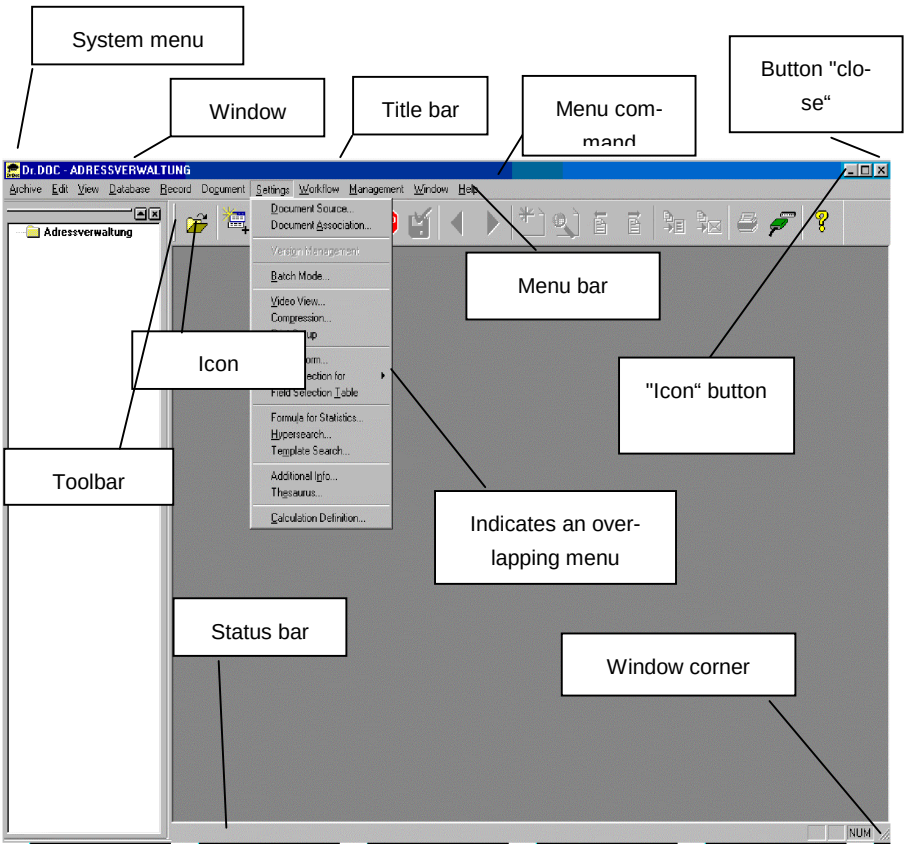
If you are not yet familiar with Windows, the following chapter will provide a brief introduction of the most important basic elements.

7. BRIEF INSTRUCTIONS: OPERATING IN WINDOWS

This chapter describes the basic elements for operating in Windows. You can find more information on working with Windows in the Windows user guide.

▶ Window

A window may look like this:



System menu field:

The commands of the system menu enable you to enlarge, reduce, move and to close the window with the keyboard as well as enabling you to switch to other application programs. You can open the system menu with **ALT**+**SPACEBAR**. (These functions can also be executed by clicking and dragging the mouse). The system menu field may also be shown in the same way as the program icon.

Title bar:
contains the name of the application program. If several windows (application programs) are open, the title bar of the active window is in a different colour than the title bar of the unassigned window.

Window title:
in Dr.DOC®: Name of the program and of the active archive.

Button "full screen":
by clicking on this button with the mouse, you can enlarge the active application window so that the complete screen is filled.
When you have enlarged a window to full screen, the button is replaced by "Restore". Its purpose is to restore the window to its previous size again. The two buttons look as follows:
or

Button "Icon":
By clicking this button, you can reduce the window to icon size. To restore the window, move the mouse cursor onto the icon and double-click with the left button.
The button looks as follows:

Button "close":
In addition, the button "close" is available for exiting the program:

Toolbar:
Many of Dr.DOC's® functions can be executed with the icons on the toolbar. The toolbar can be shown and hidden with the menu command "View/toolbar".

Quick information:
As soon as the mouse cursor is moved onto an icon of the toolbar, you obtain information on the meaning of the icon.

Status bar:
The status bar will show a brief explanation, if the mouse cursor is moved onto an icon or a menu command. The status bar can be shown and hidden with the menu command

"View/toolbar".

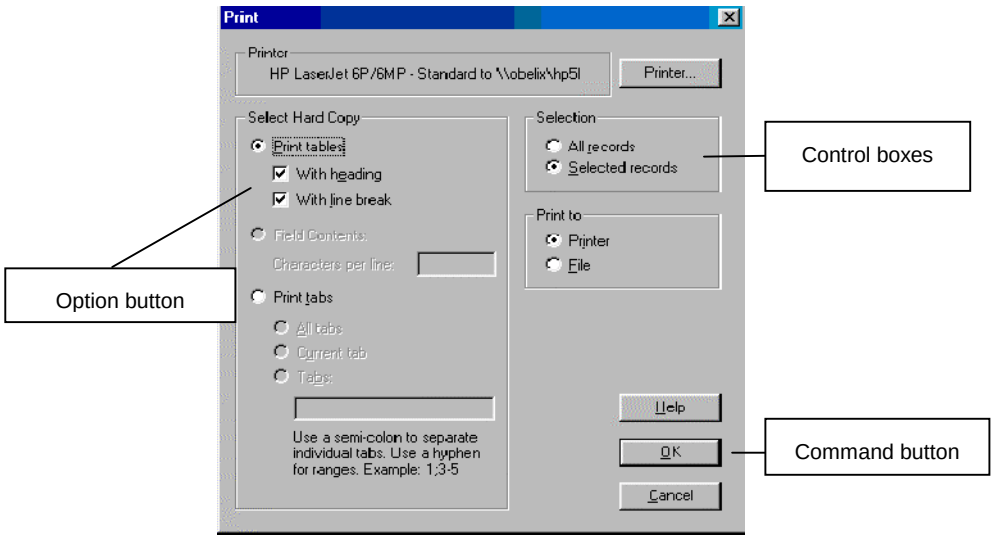
Window corner:
You can enlarge or reduce the window on two sides at the same time with the window corner. Click on one corner, hold the left mouse cursor down and enlarge/reduce the window to the required size.

Menu bar:
shows the available menus.

Menu command:
a menu contains the individual functions (menu commands), which are called by clicking or by selecting using the keyboard. Blanked functions are not available. A triangle on the right hand side next to a function indicates an overlaid menu, which lists additional commands.

▶ Dialogue field

Within programs, additional information or commands are shown in dialogue fields. A dialogue field may include the following elements:



Command button:

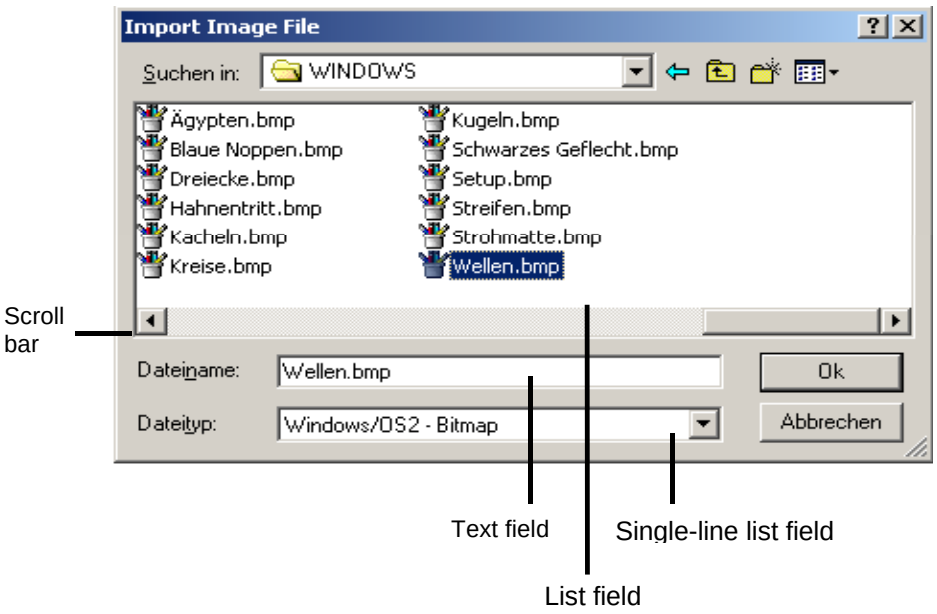
the action stated on the command button will be executed. In some cases, a dialogue field with another query may also open.

Option button:
only one option at a time can be selected here. When an option is selected, it is identified with a black dot.

Control boxes:
any number of control boxes may be activated at the same time. To deactivate an option, click once more on the activated box.

Printer:
this button will take you to the standard Windows dialogue where you can setup your printer.

Further elements in dialogue fields might be:



Text field:
A text field allows you to enter text directly. In some cases, such fields already contain a default entry, which can be changed.

List field:

A list field shows various selection options (e.g. file names). If there are more options, which do not fit into the list field, you can scroll up and down or left and right using the scroll bar. You can click with the left mouse key on one of the arrows of the scroll bar or drag the scroll field while holding down the left mouse key.

Single-line list field:
the initial single-line field shows the current selection. By clicking with the left mouse key on the arrow symbol next to the field, a list box is opened allowing the user to select another entry. If the list box was opened, but the user does not want to change the current entry, a mouse click next to the list box (i.e. in the "blank space") will close the selection without applying any changes.

The file-selection dialogue shown in the above illustration is identical for many menu items in Dr.DOC®. Therefore we would like to include some basic instructions at this point:

File name:
If the list field is empty, this indicates that no files with the extension stated in the text field exist in the current directory. The file format, which the files listed beneath it have (e.g. *.BMP), is initially always shown under FILE NAME in the text field.
Overwrite the file format with another one if required (e.g. *.DOC instead of *.BMP). This change will be applied, as soon as you click on "OK".
A click on an entry in the list box applies this entry to the text field and thus selects it for the required action. (Exception: if the batch mode is activated, several entries can be selected in the list box at the same time. In this case, the program will not make an entry in the text field).
The files can be viewed in list format or with detailed information for every file.

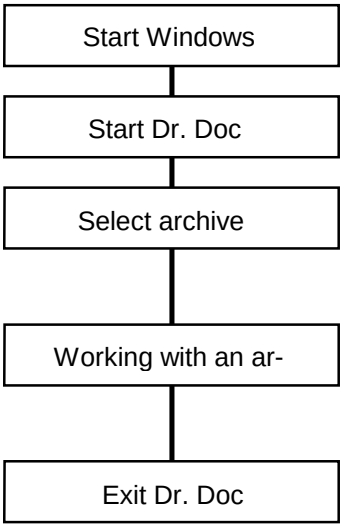
File format:
The file format can also be selected from a list for image files. To select another file format, click on the arrow symbol next to the field to open the list box, in which another format can be selected.

Directory/folder:
Next to LOOK IN the current directory is displayed, e.g. C:\DRDOC. Always check that the directory stated here is the one you require! If this is not the case, another directory can be selected from the list box below.
The corresponding icon also allows you to change to the next directory.

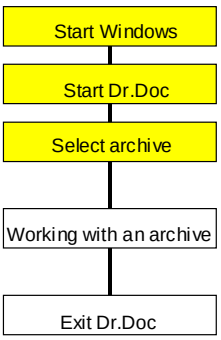
If a document is to be exported to a directory (folder) that has not yet been created, this can easily be done with the icon.

8. WORKFLOW: START - WORK - EXIT

Brief information



8.1 Start



STEP BY STEP

① ▶ Start Windows:

If you have not done so yet: start Windows.

② ▶ Start Dr.DOC®:

Double-click the Dr.Doc® icon in the Windows program manager or select the symbol using the direction keys and invoke with **ENTER** or select the symbol on the programs start menu.

An (authorized) user must be logged in with name and password for an active user set.

For C/S mode it is necessary to also run the server program (will be set up on the server during the installation) while working. This program creates the communication between archive server and individual clients (independent of the network protocol). Start this program on the archive server with the corresponding icon in Explorer.

FURTHER SUBJECT INFORMATION:

- Part 4 BASIC NOTES FOR THE C/S SYSTEM ADMINISTRATOR

③ ▶ Select archive:

Menu item "archive/select" call on "archive" menu. Select the required archive in the list box and invoke by double-clicking or with the command "OK" (see also chapter 9 SELECT ARCHIVE)

If an archive does not yet exist or a new one is to be created, call the menu item "Archive/new" (for detailled information see chapter 14 SET UP ARCHIVE)

Attention

The program is equipped with the option of a user set, in which users with various access rights can be defined.

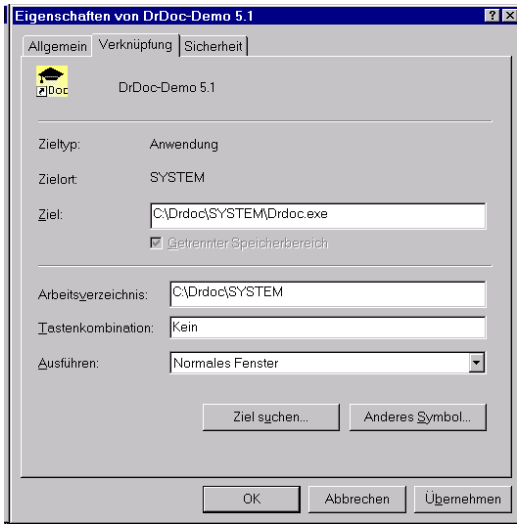
To be able to call an archive for the first time, a supervisor (= highest level of access; access to entire program) is automatically determined. If this supervisor exists, there will be no further query when the archive is called. If a user set is not required, this entry should definitely not be deleted in a single user version.

If the user set is intended to be used in a single user version or if several net licenses exist, allowing several users to work at the same time, this existing user entry must first be deleted and a personal supervisor-user with password must be set up immediately in the same operation! Please take note of the corresponding chapter 16 USER SET.

ADVICE *Start a certain archive automatically as soon as a program is called*

Optionally, the names of an archive, of a certain helper application or of a user set can be transferred, when the program is started.

Select the Dr.DOC® icon (i.e. not a double-click). Then call the "Characteristics" command.



In the "print to" command input data according to the following pattern:

drdoc path\archive path\help path\user set

Example *c:\drdoc\system\drdoc.exe c:\drdoc\letters c:\drdoc\help\whilfe c:\drdoc\system\bvw*

Confirm with "OK".

If you now double-click the Dr.DOC® icon, the stated archive is automatically called.

There are also further options for automatically logging in users. Please study the corresponding chapter.

ADVICE *Automatically restart the archive that was last edited, when the program is called*

When the program is exited, the archive, the help and the user set that have been called, are optionally saved. If this setting is saved with "Yes", this combination is automatically called again, when the program is next started. (Exception: if, as described in the advice above, a certain archive is called when the program is started, the last saved setting is ignored).

An existing archive cannot be found in the user set

ADVICE

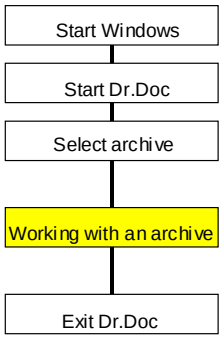
If you do not find an existing archive in the user set, this may be for several reasons:

- The archive is listed on the user set list under another name. Example: The archive was created named "letters". But "document management" is entered in the user set.
- The archive is not entered in the user set you have called. The entry is only possible in one user set. If the archive is not yet entered in a user set, it can be included via the menu item "Management/user manager".

Please note for C/S archives:
C/S archives are only opened by the client via "archive/select".
At the archive server, C/S archives can be opened from the subdirectory KOMM\SERVER at the network server.

C/S

8.2 Working with an archive

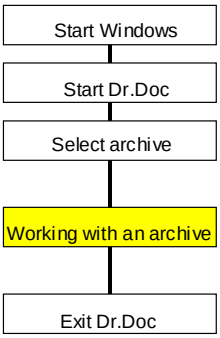


All options for working with Dr.DOC® are individually described in detail in part 3 and 4 of the manual.

As an initial overview, you will find out about the following:

- the menu items and functions that Dr.DOC® offers and how they are apportioned
- the appearance of the user interface
- the keyboard and mouse control in Dr.DOC®
- the use of the online help.

8.3 Working with an archive



All options for working with Dr.DOC® are individually described in detail in part 3 and 4 of the manual.

As an initial overview, you will find out about the following:

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- the appearance of the user interface
- the keyboard and mouse control in Dr.DOC®
- the use of the online help.

8.3.1 Overview of the menu structure

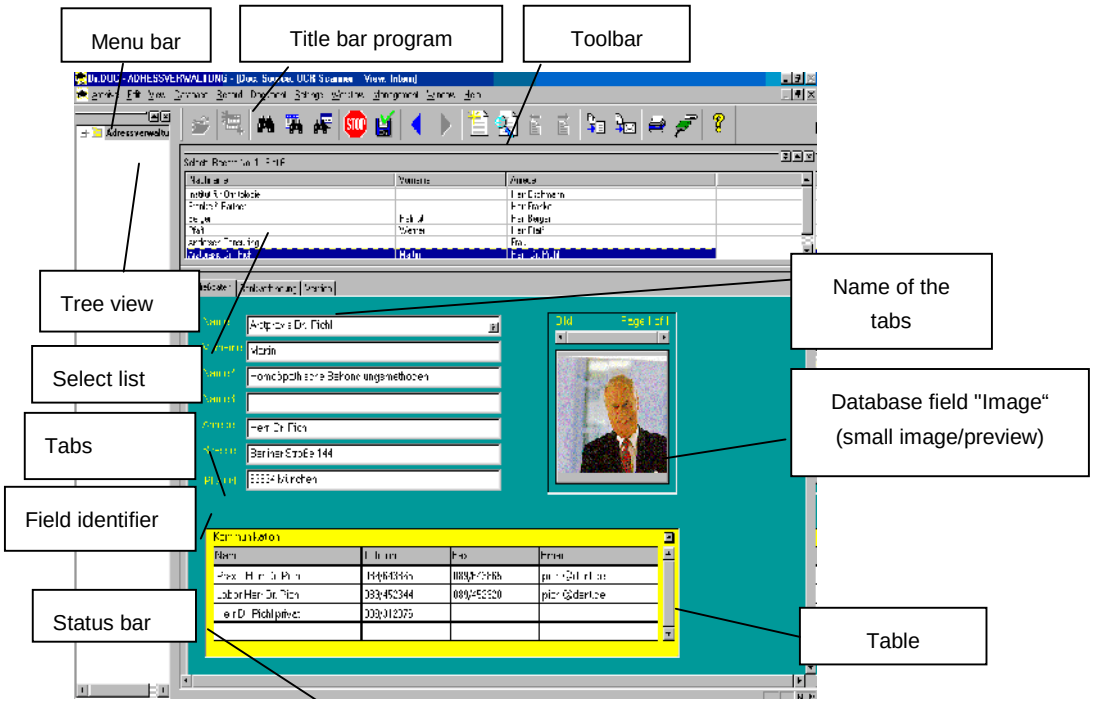
The menu...		**offers:**
Archive	⇨	Select archive, create new archive, open archive, close archive, enter archive in user set, log on and log off user, workflow activity list and editor, exit Dr.DOC®
Edit	⇨	undo, cut/ copy/ paste/ delete, select all, print field contents, field rights, reproduce, call Thesaurus, call additional info
View	⇨	Show/Hide toolbar, status bar, tree view and select list Automatically show small and large image, show large image floating freely, large image in foreground, grey scale presentation for black/white images, adjust large image to window size/width/height, 100%, user-defined, show redlining, keep entry position (=cursor position in profile data) for next record
Database	⇨	New entry, text retrieval, search fields, search fields with template, Import in ASCII/ANSI or DBASE format Export in DBASE format Information on the current archive, e.g. number of records and size of profile data and archived CI/NCI documents
Record	⇨	Save, cancel editing, next, back, allocate workflow, transfer data, e-mail, print, import and export in ASCII/ANSI format, copy, delete, replace, permissions, owner
Document	⇨	New, view, export; attach/discard image, redlining editor, print/ export/ delete/ zoom/ rotate 90°, 180°, 270° large image, back, next

Settings	⇨	Document source setting (e.g. file, OCR scanner, third-party application etc.), and the program association of archived documents Version management Batch mode for file or archiving of paper submissions; in addition: automatic archiving video view, compression, print setup Select mask; field selections for search templates, selection list, column titles, sorting, print tables, preserve field entries (new entry), output duplication check, data transfer archiving, ASCII import/export, d-BASE import/export, data types, automatic fields, mandatory fields, key fields, input duplication checks, field selection table; Formula for statistics, automatic calculations etc. Hypersearch definition; template search, Thesaurus and additional information definition, calculation definition Workflow
Management	⇨	Edit archive parameter Setup archive (all archive, forms and field definitions) reorganise archive, unset, delete; New numbergenerator; Copy archive structure, archive rights, user information, user manager
Window	⇨	Arrange overlay
Help	⇨	Index, topics, context, select help, about Dr.DOC

8.3.2 Screen setup/user interface

When an archive is called, you see the Dr.DOC® basic menu on the screen. You can enlarge, reduce or move this window.

If an archive and a record within it has already been selected, you may see the following on your screen. The toolbar and status bar can be shown or hidden under the menu item "view":



The **Dr. DOC**® program window is split into three sections to clearly show documents.

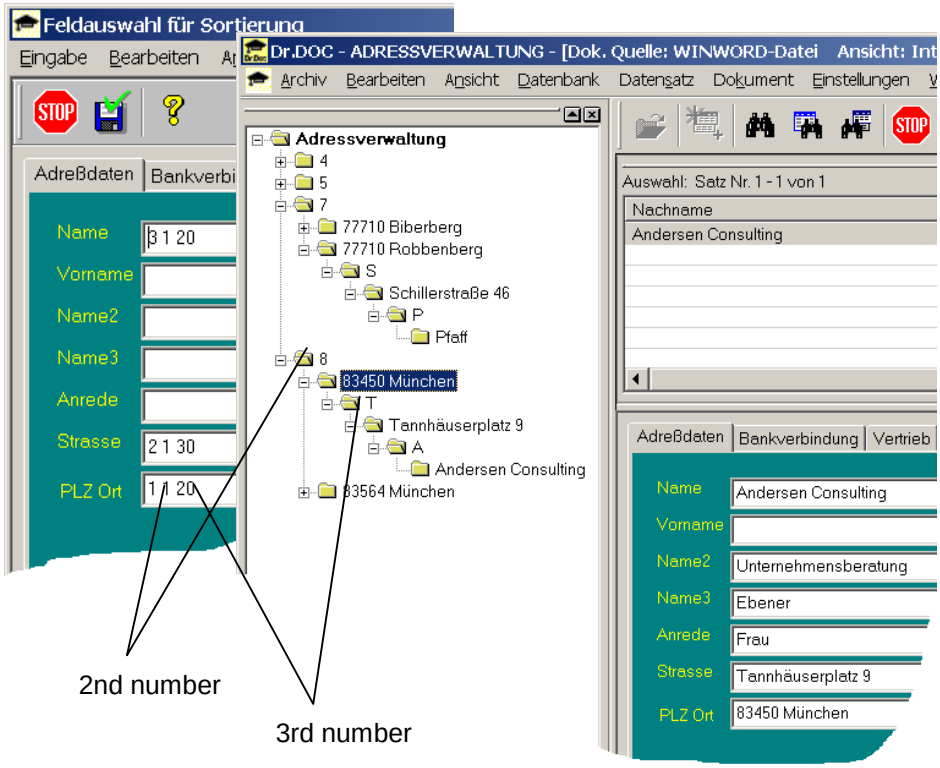
1. Tree view; virtual folder-filing structure
2. Selection list (setting see chapter 18.2.2 Outputs in the selection list)
3. Detailled record presentation; shows the record, which is currently selected in the selection list or in the tree view

The 3 windows can be shown/hidden via the menu item "View".

The configuration of the tree view (the virtual folder-filing structure) takes place under the menu item "Settings/field selection for../sort".

Example

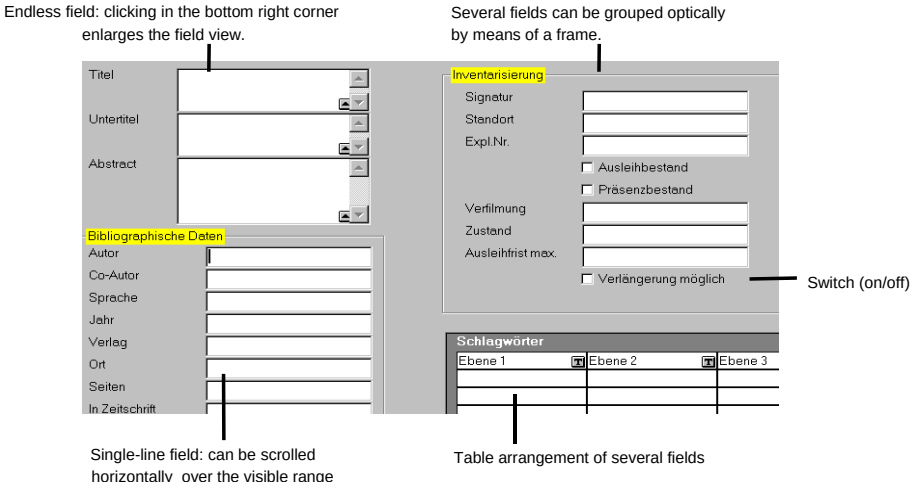
When a postal code register is generated, you will see the possible entries under "Settings/field selection for../sort" in the illustration on the left hand side. The result is shown in the illustration on the right hand side.



The first number means the sequence according to which the field entries are to

be shown. The second number refers to the number of positions according to which sorting is to be executed in an initial step. The third number is the number of positions, which are to be shown in the next sorting step.

The description data (profile data) of a record may consist of the following field types :



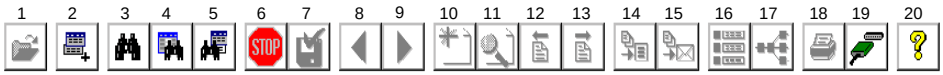
In addition, fixed (i.e. which cannot be changed by the user) comments can be created for the individual fields.

FURTHER SUBJECT INFORMATION:

- Windows User Guide
  CHAPTER. 14 SET UP ARCHIVE
  CHAPTER 18.2 DEFINE/CHANGE OUTPUT CRITERIA

8.3.3 Toolbar

The most important commands and functions in Dr.DOC® can also be executed via the toolbar :



1: Select archive
2: New entry mode
3: Text retrieval
4: Search fields
5: Search fields with template
6: Cancel respective action
7: Save record (with archived document), (menu item "record/save")
8: Go back to previous record on selection list
9: Go to next record on selection list
10: Archive documents, (menu item Document/New). The basic setting for the document source is defined under the menu item "Settings/Doc.source"
11: Document/Display: View the archived document in the relevant third-party application or - for images - show via the internal viewer
12: Page up (for multi-page image documents)
13: Page down (for multi-page image documents)
14: Start data transfer (workflow) to third-party application
15: Start E-mail function
16: Display activity list (workflow)
17: Display workflow manager
18: Print
19: Settings/Doc.Association: Set the document association (third-party application or internal viewer)
20: Call help

In addition, some functions have the following extra icons:

Start search action

Activate/deactivate duplication check when searching

Case-sensitive search on/off

Hypersearch

Recurse hypersearch

Save configuration

Select form

Typeface (redlining editor)

Font colour (redlining editor)

The icons for the user set are explained in the corresponding chapter in more detail.

8.3.4 Keyboard and mouse functions

YOU WOULD LIKE TO ...	**WITH THE KEYBOARD:**	**WITH THE MOUSE:**
call menu item or command (dimmed menu items or commands are not available.)	**ALT** + underlined letter of the menu item or command	Left mouse button
Abort menu item	**ALT+F4** or **Ctrl+A**	Left mouse button
WITHIN THE INPUT MASK:		
go to various positions:		
- next field (according to tab order)	**TAB, ENTER**	Left mouse button
- previous field	**SHIFT + TAB**	Left mouse button
- next or previous tab	**Ctrl + IMAGE ↓** or **IMAGE ↑** or **Ctrl + tab** or **Ctrl + Shift + Tab**	Left mouse button
- Beginning or End of the current line	**POS1** or **END**	Left mouse button
- at beginning or end of a continuous field / of a table	**Ctrl + POS1** or **Ctrl + END**	Left mouse button
- any position of a continuous field	← ↑ → ↓	Left mouse button
Edit tables:		
- New line	← ↑ → ↓	
- insert line above cursor position	**Ctrl + ENTER**	
Insert:		
- Enable or disable insert mode/overtype mode	**INS**	
- New line in continuous field	**ENTER**	
- Text from clipboard	**Ctrl + V** or**SHIFT + INS**	Right mouse button
Select (from cursor position):		
- one letter	**SHIFT +** ← or →	Left mouse button
- one word	**Ctrl + SHIFT +** ← or →	Double-click left
- to start of line	**SHIFT + POS1**	Left mouse button
- to end of line	**SHIFT + END**	Left mouse button
- Line by line in continuous field	**SHIFT +** ↑ or ↓	Left mouse button
- to beginning/end of continuous field	**Ctrl+SHIFT+POS1/END**	Left mouse button

YOU WOULD LIKE TO ...	WITH THE KEYBOARD:	WITH THE MOUSE:
Delete/Copy:		
- delete the current tab	**SHIFT + F4**	
- delete letter prior to cursor position	**BACKSPACE**	
- delete one letter at cursor position or a selection	**DEL**	Right mouse button
- cut selection	**Ctrl + X** or **SHIFT + DEL**	Right mouse button
- copy selection to clipboard	**Ctrl + C** or **Ctrl + INS**	Right mouse button
- delete entry of single-line field from cursor position	**Ctrl + DEL**	
WITHIN A LIST (selection list or list box) :		
select on a list:		
- one entry	↑ or ↓	Left mouse button
- several consecutive entries	**SHIFT +** ↑ or ↓	SHIFT + left mouse button
- several not consecutive entries	**Ctrl +** ↑ or ↓ **+ SPACEBAR**	Ctrl + left mouse button
- to end or beginning	**SHIFT + END** or **POS1**	SHIFT + left mouse button

More keyboard commands...			
Context help	**F1**	Select archive	**ALT + F2**
Additional information (control via cursor position)	**F2** or **Ctrl + I**	New entry	**ALT + F3** or **Ctrl + N**
Thesaurus (control via cursor position)	**F3** or **Ctrl + T**	Exit	**ALT + F4** or **Ctrl + A**
Delete entire profile data on all tabs	**F4**	Text retrieval	**ALT + F5**
Previous record	**F6** or **Ctrl + U**	Search fields	**ALT + F6**
Next record	**F7** or **Ctrl +O**	Search fields with template	**ALT + F7**
Page up in document	**F8**	New document	**ALT + F10**
Page down in document	**F9**	Transfer data (workflow)	**ALT + F11**
Menu control: "Archive"	**F10**	E-mail	**Ctrl + M**
Document - View	**F11**	Print	**Ctrl + P**
Save	**F12** or **Ctrl + S**	Redline editor	**Ctrl + R**

8.3.5 Context menu

The context menu is called with the right mouse button and includes the most essential of the "currently possible“ functions. The content differs from dialogue to dialogue

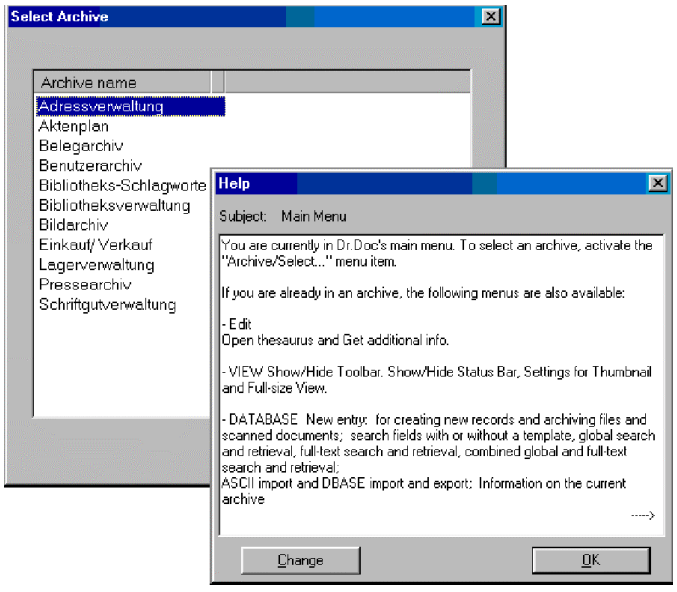
8.3.6 Using help

If you ever get stuck while working with the program, simply call the "Help" menu.

▶ Context help:

The context help offers immediate direct assistance regarding the current menu item.

Without leaving the menu item, call "Help/Context"in the main menu, select the button "Help" in the respective dialogue or click on the help icon on the toolbar.


Select Archive
Archive name
Adressverwaltung
Aktenplan
Belegarchiv
Benutzerarchiv
Bibliotheks-Schlagworte
Bibliotheksverwaltung
Bildarchiv
Einkauf/ Verkauf
Lagerverwaltung
Pressearchiv
Schriftgutverwaltung
Help
Subject: Main Menu
You are currently in Dr.Doc's main menu. To select an archive, activate the "Archive/Select..." menu item.
If you are already in an archive, the following menus are also available:
- Edit
Open thesaurus and Get additional info.
- VIEW Show/Hide Toolbar, Show/Hide Status Bar, Settings for Thumbnail and Full-size View.
- DATABASE New entry: for creating new records and archiving files and scanned documents; search fields with or without a template, global search and retrieval, full-text search and retrieval, combined global and full-text search and retrieval;
ASCII import and DBASE import and export: Information on the current archive
---->
Change
OK

With the "OK" command, you will return to the selected menu item.

▶ Keyword directory:

Via the menu item "Help/Index" you will arrive at a keyword directory, from which you can select a certain key term. Select the required keyword and activate the command "View" to obtain detailled information about this term. Exit the menu item with the command "OK".

▶ Topic directory:

The menu item "Help/Topics" shows various program topics. When you select a topic, a keyword overview of this specific subject area allowing you to make another selection with the "View" command is provided. With the command "OK" you can exit the menu item.

Archive-specific help

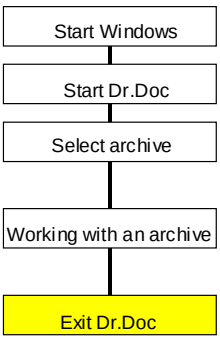
ADVICE

Special help can be set up for every archive for standard texts to be added to and changed as desired. E.g. special information on the new entry can be entered in the context help.

MORE INFORMATION ON THIS TOPIC IS INCLUDED IN:

- 31. HELP SELECTION AND MAINTENANCE

8.4 Exit



▶ Close open functions:

Close any open menu items within Dr.DOC®.

▶ Close archive:

An archive is automatically closed as soon as another is called (e.g.: after the address management the document management is called) or when the program is shut down. In addition, an archive can be closed with "archive/close" on the menu.

If you only want to log off as user, call "archive/user login" on the menu and activate the "log off" command.

▶ Exit program:

You exit the program via the menu "archive/exit", by double-clicking on the system menu field or by clicking on the "Stop icon". The query whether the archive settings should be saved refers to the arrangement of the individual windows within Dr.DOC® and to the archive, the user set and the help that were previously called.

C/S

In C/S mode the **Dr.Doc®** server program is operating at the archive server to communicate between the individual workstations. This program should only be closed down, when there is no other C/S application active. This process is shut down properly via "Server/Exit".

PART 3

The following describes

how to work with an archive

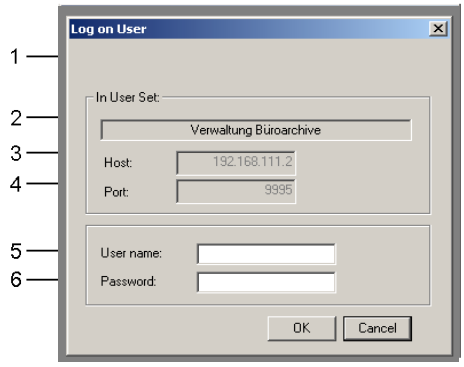
WORKING WITH DR.DOC®

9. LOG ON USER

The program is protected with a user set with passwordprotection. User names and the respective associated passwords are determined by an authorized user under the menu item "Management/ User manager". The user is asked for the user name and password, when the program is started.
If the “automatic login using network username” function was allocated to the user in the user set, this query is omitted.
In addition, "Archive/log on user" offers the option to change the user or to log off a user without having to exit the program (e.g. if several users work at the same desktop).

MORE INFORMATION ON THIS TOPIC IS INCLUDED IN CHAPTER:
- 16.2 BRIEF INSTRUCTIONS USER SET

▶ If the user set specifies a query when the program is started, the following dialogue will appear:



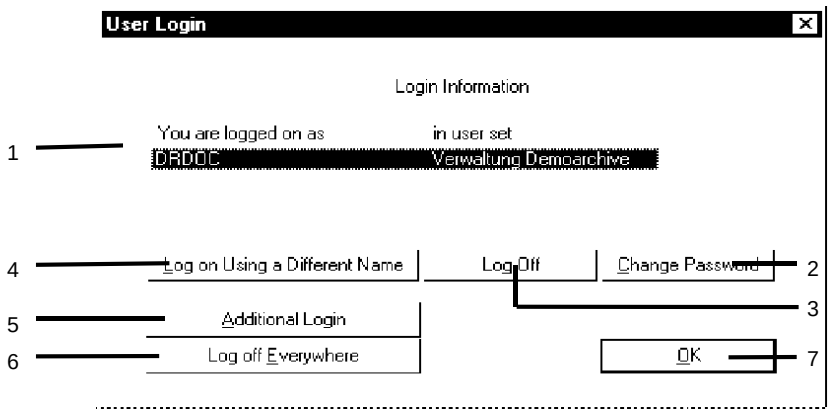
1) Display preset archive
2) Name of the user set
3) Host name on archive server
4) Port for C/S communication
5) Text field user name; Case-sensitive entry
6) Text field password; Case-sensitive entry. The password is shown encrypted (in contrast to the user name).

Tip

The user name or the password is not accepted

- Is your entry case-sensitive?
- Perhaps you are trying a name or password, which is not set up in the current user set.
- If you cannot solve the problem: the system administrator can read the authorised correct entries in the user manager (except the password)!

▶ When the menu item "Archive/user login" is called, the following dialogue appears:



1: Display current user (cannot be changed).
2: Change password for current user: Enter the new password twice (with confirmation).
3: The current user is logged off, a new user is not logged on.
4: Log off current user and log on new user (with name and password).
5: Log on current or other user in a user set to be selected.
6: Log off curent user in all user sets.
7: Exit user login, changes will be applied.

MORE INFORMATION ON THIS TOPIC IS INCLUDED IN CHAPTER:

- 16 USER SET

10. SELECT FORM AND ARCHIVE

10.1 Select archive

If you call an archive or if you want to change to another archive, activate the menu item "Archive/select". When you call an archive, you do not need to know the drive or the directory where certain archives are stored, once this entry has been made once. This makes it considerable easier, particularly for C/S applications.

When the menu item "Archive/select" is called, a selection list of the available archives is displayed. Select the required archive and open it with a double-click (left mouse button) or with the command "OK".

Tip

You want to call an archive, which is not entered in the user set?

Via "Archive/open" select the relevant directory and the name of the archive. This is only possible for the single user version, in the standard network and at the archive server in C/S mode.

C/S

The following must be observed for C/S archives:

- Call at the client:
  Only archives, which were allocated in the active user set, can be selected (via “archive/select”)!
  If a user set is not yet active, you can log on to one via “archive/user set/additional login”.
- Call at archive server:
  Archives in the KOMM/SERVER subdirectory can be opened here.

MORE INFORMATION ON THIS TOPIC IS INCLUDED IN CHAPTER:

- 14. SET UP ARCHIVE

10.2 Select form

The text fields of the archive are arranged in so-called forms on the screen. With the selection of the archive, an associated mask is also generally called.
If no form is active, the data cannot be accessed and the icon for "form "select" appears on the toolbar.
To call a form, click on this icon or call the menu item "Settings/select form". Select the required form from the list and confirm with "OK".

Note The access to forms is subject to the user definition.

11. NEW ENTRY

So-called profile data is also saved for every document. But it is also possible to create and save only profile data without a document (as in a classic database).

A simple example is the address management. For some addresses thumbnail images are managed here, only the transparent address data exists for others. Documents can of course also be attached subsequently to existing records.

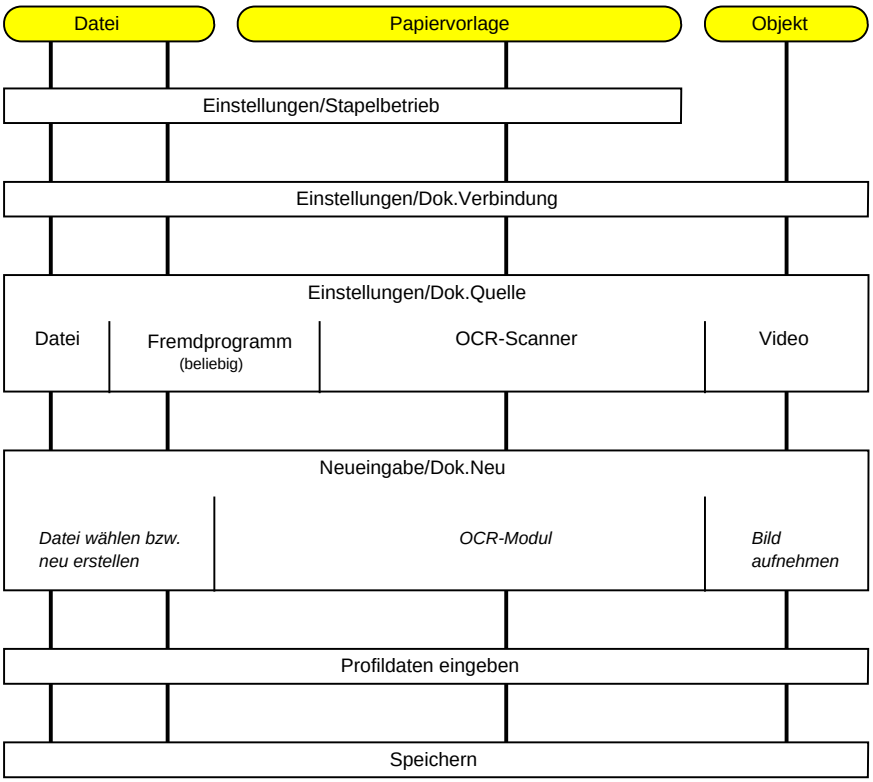
It is also possible to link two archives, e.g. the communications of a selected address can be displayed in the document management

The relevant chapters describe how to define basic presets for the new entry (e.g. data types, mandatory field entry).

MORE INFORMATION ON THIS TOPIC IS INCLUDED IN CHAPTER:

- 18.1 DETERMINE ENTRY CRITERIA

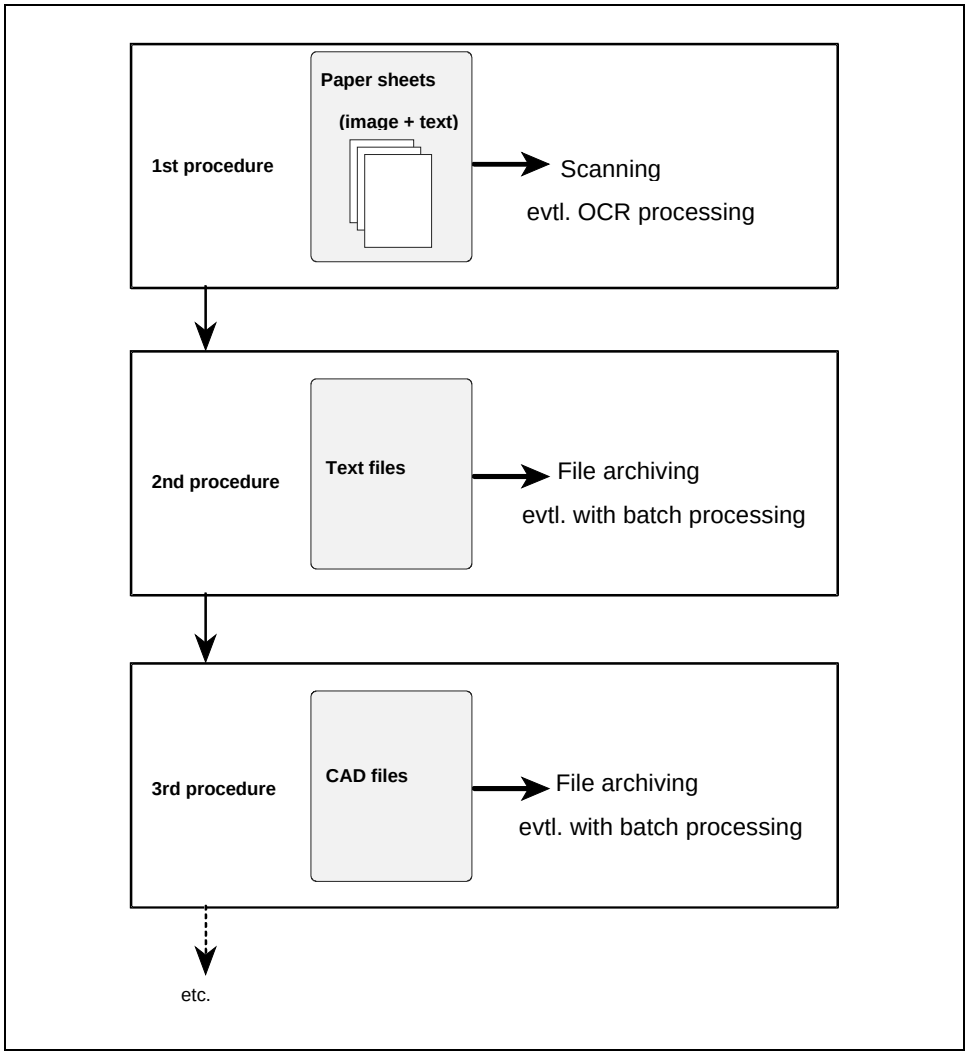
11.1 New entry: General brief information



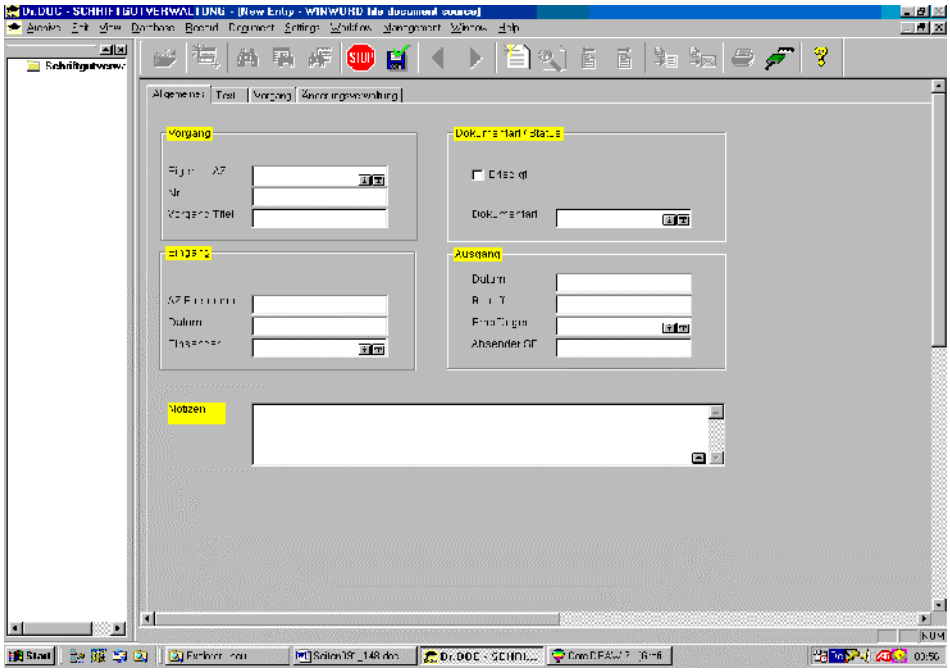
Dr.DOC® can manage data of all types, e.g. paper sheets, which are scanned and edited with OCR and/or bar code recognition, files of any format, "Objects" e.g. recordings with video, etc.

Tip

Advance planning facilitates the task!
It is definitely most effective to process identical archive material in one operation to then go on to the next archive material. The following illustration is an example of this.



If you call the "database/new entry" menu item, a window with an input mask of the current archive (here document management of the sample archives) appears on the screen. The commands and functions for the new entry can be found on the corresponding menus and on the toolbar.



The following chapters show you how to

- create new profile data
- archive documents (files and paper sheets) step by step

11.2 Create new profile data

If you want to create records without documents or enter profile data for a document, proceed as follows:

- ➔ The cursor is initially always in the first field. Enter the data using the keyboard.
- ➔ The next field is reached by clicking on it with the mouse or with the **TAB** or **ENTER** key. The next field can be determined via the tabulator sequence under "Edit elements".
  Exception: Using the **ENTER** key in continuous fields results in a line break.
- ➔ for several tabs click on the next one with the mouse or browse with **Ctrl + TAB.**
- ➔ To create a new line in a table above the cursor position press the key combination **CTRL + ENTER**.

Be aware that single-line fields can also be scrolled. That means: the entries may be longer than the space that can be seen. A maximum of 128 characters can be entered in a single-line field. Nevertheless you should try not to write too far into the space that cannot be seen to in order to keep fields easy to read.

Please refer to chapter 8.2.4 KEYBOARD AND MOUSE FUNCTIONS for detailed information on the keyboard functions when data is being entered.

Tip

If the cursor is not to jump into the first field of the first tab in the next record, but instead the last entry position is to be kept, the menu item "View/keep entry position" must be activated.

There are various other helpful additional functions for entering data:

- Thesaurus
- Maintaining records for subsequent entries
- Importing ASCII/ANSI data
- Simplifying inputs by duplicating existing records (only profile data)
- Input duplication check

These functions are explained in the following section.

▶ Thesaurus:

To facilitate the input of field entries, e.g. hierarchical orders, and to guarantee the consistency of these entries,an option is provided for applying entries from another archive using the "Thesaurus" command.

A prerequisite for this function is that

- the link has been determined under the "Settings/Thesaurusdefinition" menu item in the archive, in which the data is to be applied.
- this Thesaurus includes a record with an identical profile data entry in the reference field concerned.

MORE INFORMATION ON THE THESAURUS IS INCLUDED IN CHAPTER:
- 19 CREATE THESAURUS

➔ Simply enter the term from the reference field of the Thesaurus in the field concerned. This may be:
- the complete field entry
- part of a word (in connection with the ***** (as in the "search fields" function!))
- the "*" sign or nothing at all (i.e. only the cursor flashes), if you want to view the complete list, or
- an abbreviation, if the Thesaurus is defined accordingly.

➔ Activate the "Edit/call Thesaurus" command or click on the icon in the right corner of the field:

Exceptions:
If the option "Autoadopt from Thesaurus" is activated, the entry will be adopted when the "Save" command is used
If the "check automatically" option is selected, a consistency check to establish whether the same entry exists in the Thesaurus archive is carried out when saving. Only then can the record be saved.

➔ If only one relevant Thesaurus entry is found, you have to state whether the entry is to be appended to any already existing entries or whether these are to be overwritten.
If several entries are found, a selection list will be displayed and the required entry can be selected with the "Append" or "Overwrite" command.
Exceptions:
If the option "Autoadopt from Thesaurus" is activated, it must be possible to clearly allocate the "search string" to a Thesaurus entry.
If the "Append" or "Overwrite" option was already selected on defining, a selection list will not be displayed.

Tip

There may be several reasons for the entered term not being found in the Thesaurus:

- The cursor is not placed in the relevant field.
- The entry was incorrect. In this case, exit the query whether a new Thesaurus entry is to be applied with "No" and correct the entry.
- The entry does not yet exist, but is to be included in the Thesaurus.
  In this case, confirm the query with "Yes". The programm will then call up the Thesaurus for a new entry. Input your new Thesaurus entry and confirm it with "Ok". You can then exit the Thesaurus entry screen with "cancel".
  If you now activate the "Thesaurus" command in the original archive again, the new entry will be applied.

MORE INFORMATION ON THIS TOPIC IS INCLUDED IN CHAPTER:

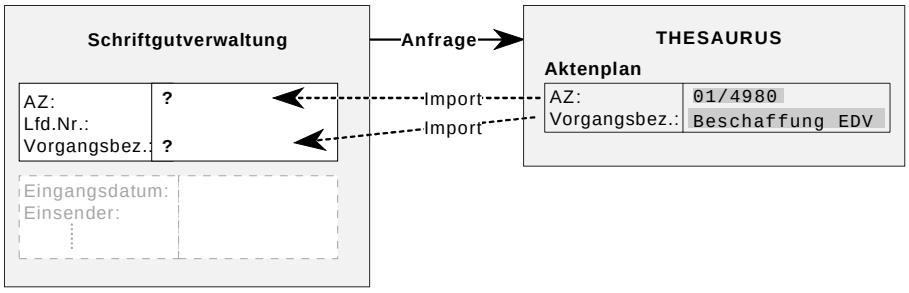
- 19 CREATE THESAURUS

Note

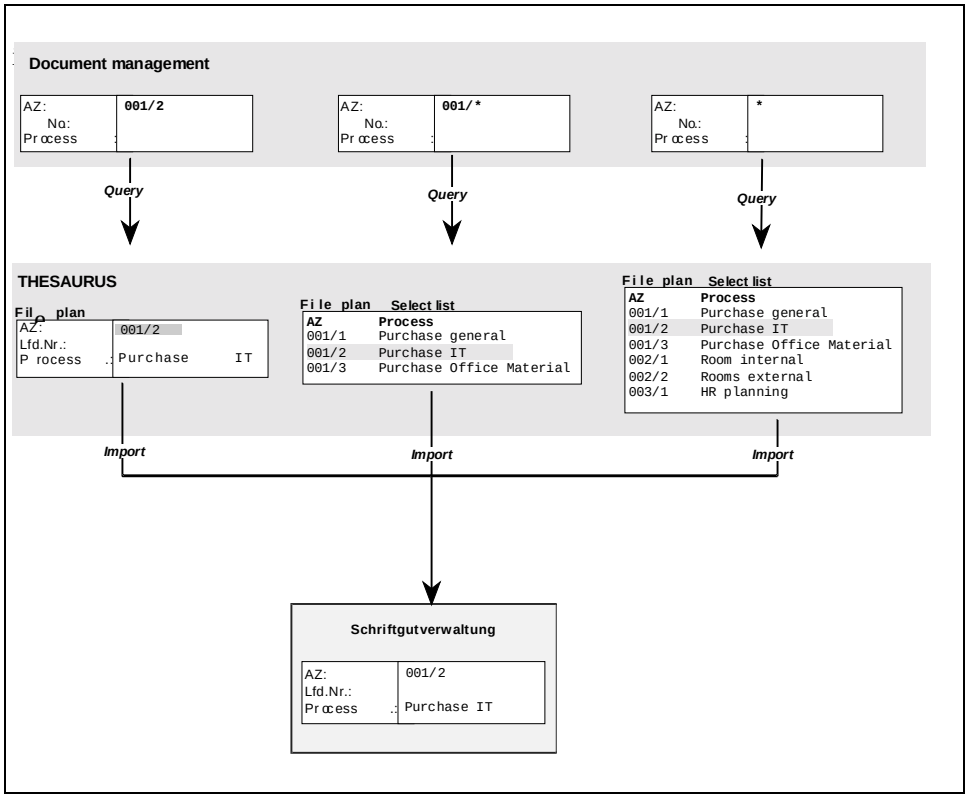
If the "check automatically" option is activated, an entry must be made in a Thesaurus field, as "no entry" is synonymous with an incorrect entry in this case

Example

Any completely nonsensical numbers can be entered in a document management, e.g. in a "Reference" field. The structural order is maintained, but not as regards its contents. To ensure consistency of the data as regards content, a file plan is put down as Thesaurus.
The file plan includes the exact references with the event name.



To adopt references from the file plan, the Thesaurus (=file plan) is called up in the AZ field in the document management. It is possible to search for complete entries (e.g. 001/2), partial entries (e.g. 001/*) or any available references (*). If available, the same entry can be adopted in every case, as the following illustration shows:



▶ Maintaining entries:

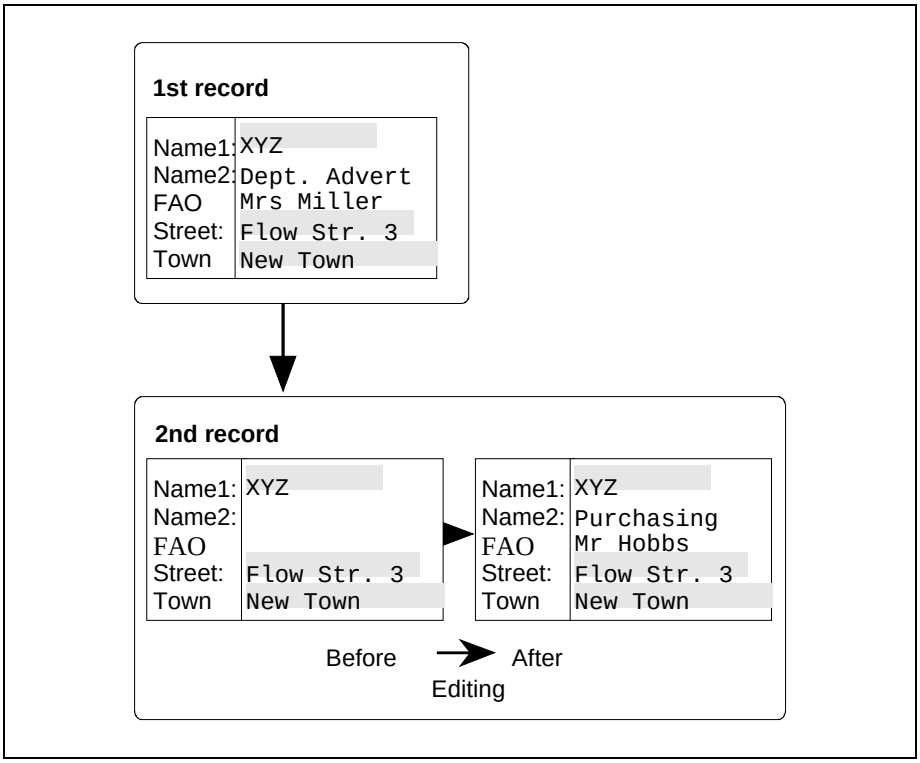
After a record has been saved, the entries in individual fields are deleted on screen or maintained - subject to the archive setup. This can be changed on the "Management/edit archive parameter..." menu by selecting the option "delete form after entering new record".

- If this option is not selected, all entries in all fields are maintained after saving and can be used for the following record. With "overwrite" or "delete", the new profile data is changed accordingly.

- If this option is selected, all entries in all fields will be deleted when saving. This option is recommended, if the profile data records to be entered are very different or if there is some danger that certain entries from the previous record will be accepted by mistake and without being questioned (e.g. entries on hidden tabs).

  If you nevertheless want to maintain individual field entries, enter any character in the fields concerned under the menu item "Settings/maintain field selection for field entry ".

You will see an example on the next page.



MORE INFORMATION ON THIS TOPIC IS INCLUDED IN CHAPTER:

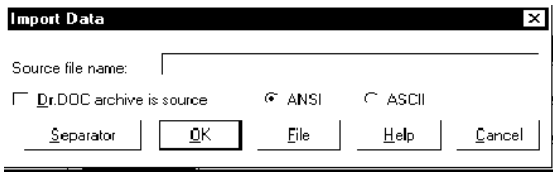
- 18.1.7 MAINTAIN FIELD ENTRIES ON ENTERING NEW RECORD

▶ Import ASCII/ANSI data:

ASCII/ANSI data can be adopted in the new entry of a record with the "Record/import ASCII" command.

Example Descriptions for sales articles, which do not have to be copied, but are simply to be imported in a continuous field in the new record, are available.
The prerequisite is that the field or fields for including the imported data are stated under the menu item "Settings/field selection for ASCII import".

➔ Call up the "Record/import ASCII" command on the new record.



➔ If the data is to be imported from another archive, select this option.
When importing external data, enter ASCII or ANSI format.
Enter the file name for the import file.
If required, also enter the ASCII values for the field, record and document separators of the import file using the "Separator" command.

➔ The import is executed with "OK".

Note Only one record is imported in this way. To import several data records, use "Database/import ASCII/ANSI".

MORE INFORMATION ON THIS TOPIC IS INCLUDED IN:
- 21.2.1 IMPORT ASCII/ANSI FILE ...

▶ Simplifying entries by duplicating existing records:

A new record, which is in large parts identical to an already existing one, is easily created in edit mode. Find the existing record and duplicate it using "record/copy". A dialogue field allowing you to determine whether the record is copied as new document, as new version, with or without document data, will appear. If you confirm with ”OK”, "Duplicated record" will be shown in the dialogue title line. This can now be edited and changed.

Be aware that

- changes in the record found, which have not yet been confirmed with "save", only exist in the newly created record.

- prior to duplicating, changes have to be made (without saving them), if an input duplication check is set up. Otherwise you will receive an error message stating that duplicates are not permitted.

- any existing documents found in the record are not included in the duplicated record. However, it is possible to attach new documents to the duplicated record during the same operation.

- the duplicated record will not be shown on the selection list until a new search query is carried out.

▶ Input duplication check:

The input duplication check is for the many cases, where the user wants to prevent an entry being input twice by mistake on capturing (i.e. is filed as a so-called duplication), a helpful control instrument for increasing acquisition quality.

DEFINITION INFORMATION IS INCLUDED IN CHAPTERS:
- 18.1.5 KEY FIELDS/CREATE INDEX
- 18.1.6 INPUT DUPLICATION CHECK

As soon as two records have the same entry in a certain field when a new record is entered, the program examines further default fields to establish whether matching entries are also in existence here. If yes, an error message will be issued. Change the new entry accordingly to achieve uniqueness.

As a reference may be the same for several documents, the input duplication check should also be defined for several fields.

Example

An address management has a field for "Name", a field for "Town" and one for "Street". The entry "Mr Smith" may exist several times in London, it only becomes unique with the exact address. The uniqueness is given in this case, if Mr Smith lives in Lord Street in London. Mr Smith in Lion Street in London is unique.

Tip

Work with the data from the new record straight away

When a record is saved, you can execute some editing functions immediately without exiting the new form. The functions itself have to be operated as in edit mode, therefore we only refer to the corresponding chapters here.

You can

- print the profile data with the "record/print" command
  RELEVANT INFORMATION IS INCLUDED IN CHAPTER:
  - 13.3 PRINT

- transfer the profile data optionally with or without image document with the "record/transfer data" command to a third-party application
  RELEVANT INFORMATION IS INCLUDED IN CHAPTER:
  - 13.4 TRANSFER DATA

- export the profile data optionally with document using the "record/export" command
  RELEVANT INFORMATION IS INCLUDED IN CHAPTER:
  - 21.3.1 EXPORT IN ASCII FORMAT ...

- delete the entire record (e.g. in the case of a false entry) using the "record/delete" command
  RELEVANT INFORMATION IS INCLUDED IN CHAPTER:
  - 13.2. CHANGE AND DELETE

Be aware that these functions only refer to the last record just saved!

11.3 Archive documents

You can archive

- Files of any programs of any type (texts, graphics etc.)
- Any text and image models via a scanner
- Video recordings or similar via a video camera

Files of other programs are recalled with the respective program via a so-called link (= connection), which is stated on archiving. This call via an external Dr.DOC® program has the big advantage that all of this program's editing options, with which, as a rule, the archived document was also created, are available for this document.

Newly scanned sheets or still videos recorded via a video camera are normally recalled with the internal viewer.

ON IMPORTING DOCUMENTS VIA THE COLD INTERFACE, SEE
- 21.4 COLD INTERFACE

Step by Step

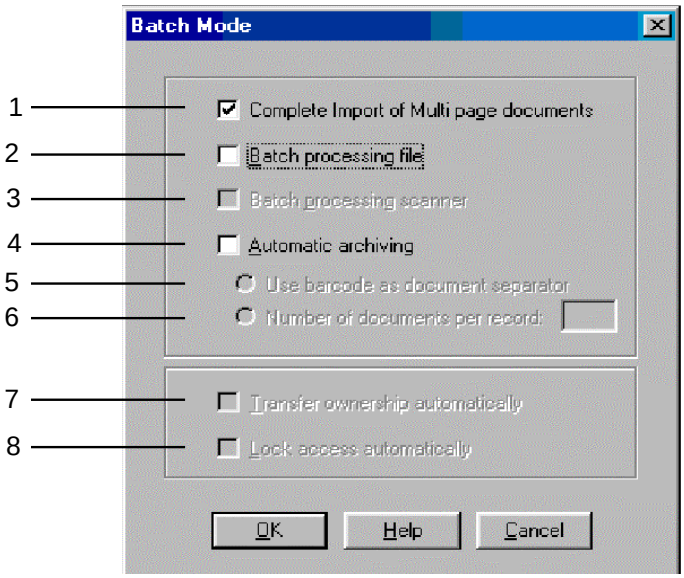
Before entering the new record, determine the methods for archiving the various types of documents. These basic settings, which are defined within the "Settings" menu on the main menu, can be changed at any time, even whilst entering the new record.

The following points should be decided in advance and the relevant settings should be determined:

1. Batch processing
2. Document association
3. Document source

① ▶ Batch processing:

Call "Settings/batch mode"
.



1: Multi page documents (e.g. TIF files with several pages) are adopted in full, otherwise you have to confirm each individual page

2: Any files can be processed in batches. But please be aware:
- A batch may only include files with the same format.
- A document may only be created from one file (exception: NCI files, which are linked with the internal viewer). The other files selected in the batch are automatically displayed in the title line of the input window after the previous one has been archived.

3: Scanning paper batches automatically is only possible using scanners with automatic feed.

4: The archiving action for batch or individual processing can be further automated here. Files or Model pages are archived in set intervals (see 5: and 6:) :
- automatic fields for user, date, number generator and in the case of files, the file name (Attention: if several files are combined into one document for the internal viewer, the automatic field "file name" will not be filled!).
- adoption of manual entries, which were entered in the first record prior to starting batch processing (possibly in connection with various automatic fields).

MORE INFORMATION ON THIS TOPIC IS INCLUDED IN CHAPTERS:
- 18.1.2 AUTOMATIC FIELDS
- 18.1.7 MAINTAIN FIELD ENTRIES ON ENTERING NEW RECORD

5: Barcode as document separator:
A new record is created, when the system recognises a barcode in the barcode frame when using batch processing and bar code recognition.

6: Enter the number of pages, which are to be combined into a document. This information is relevant in conjunction with the automatic archiving.

7: You can only select this field, if you belong to an owner group, which is associated with the archive and if you have the relevant archive rights.

8: By activating field 8, “lock access automatically” can also be operated.

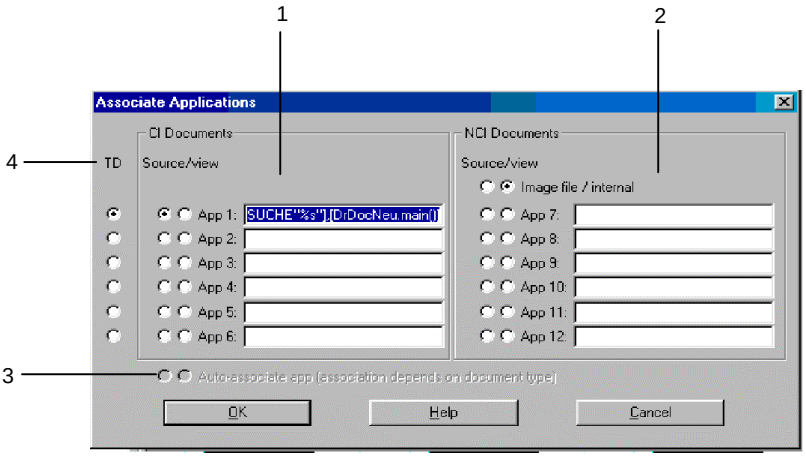
YOU WILL FIND SOME INFORMATION REGARDING THE “USER SET” IN CHAPTER 16.3.

② ▶ Document association (program link):

The following are distinguished:

- Documents originating from CI programs enabling direct searches with text retrieval (e.g. word processing or spreadsheet programs)
- Documents originating from NCI programs or available as raster image, i.e. which are not suitable for text retrieval.

Call "Settings/doc.association".



1: The CI documents column allows you to enter word processors, spreadsheets, vector-orientated drawing programs etc.

2: The NCI documents column contains the Dr.DOC® internal image data viewer , which can also be used for viewing documents archived via a scanner. In addition, it is possible to enter various other types of programs in this column (e.g. raster-orientated drawing programs, CAD, notation etc.).

3: When the "auto-associate app" option is selected, Dr.DOC® automatically sets the app subject to the file type (file extension).

Example If a file selected for archiving is named *expenses.xls*, Dr.DOC® automatically selects Excel as association.

Note In archives, which were created with a previous version of Dr.DOC® 5.0, the auto-associate app function must be activated subsequently. Create the following two fields (both single-line fields, data type text): "ContentType" and "Extension" (match case). Afterwards reload the archive. (These fields cannot be inserted in the mask).

4: The association for exporting data to third-party applications (e.g. word processing) is createdin the TD column (transfer data). This association is not required for archiving documents and is therefore not described in any detail.

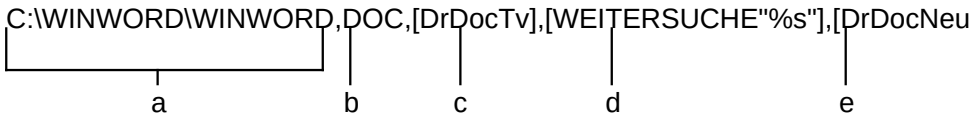
MORE INFORMATION IS INCLUDED IN CHAPTER:
- 18.3. PREPARE DATA TRANSFER TO THIRD-PARTY APPLICATION

Dr.DOC® must know the origin of the data to be archived (selection "Source") and how the data is meant to be viewed (selection "view").
The source does not have to be identical to the view app of the archived document.

Example An Excel spreadsheet is to be archived. Excel is selected as the source app. The archived document is to be viewed in Winword, when it is retrieved and not in Excel - i.e. the Winword association is selected as view application. This association with Winword will be archived with the document. Should you subsequently wish to view the spreadsheet in Excel or in another wordprocessing program, you can simply change the association - instead of the archived association with Winword, select the one you require for this particular instance.

The Winword association is the default entry, as Dr.DOC® has no way of knowing the programs that are available to each respective user.
It is best to enter the programs, which are available for files to be archived or for viewing documents, in one operation.

Note for the entry:



The following details are generally stated
a: drive, directory and program name.

In addition, you <u>can</u> enter (separated by commas, without blank)

b: a file name extension. The file selection list box will be filled with this file type.

c: the macro for the data transfer. The program contains a macro for Winword as default, which is entered in the way stated above.

d: For DDEcapable programs a DDE command to open files. These commands are subject to the respective program to be contacted and are always in square brackets.
In Winword, any macro can basically be used as DDE command. Further examples of corresponding DDE commands of other programs:
Excel: [Open("%s")]
AmiPro: [FileOpen("%s" 1 "")].
The applicable DDE commands for the programs you use can be found in the respective guides.

e: A macro, which automatically creates a new file in the program concerned, if it is started via document/new. Such a macro is supplied as standard for Winword.

The order in which these arguments are entered must be strictly observed. e.g. if you do not want to enter a data transfer macro, but a DDE command, you still have to set the commas for both arguments (i.e.: two commas before the DDE command).

Note

In order to open archived Winword **8.0** documents without problems, change the Winword-app as follows:

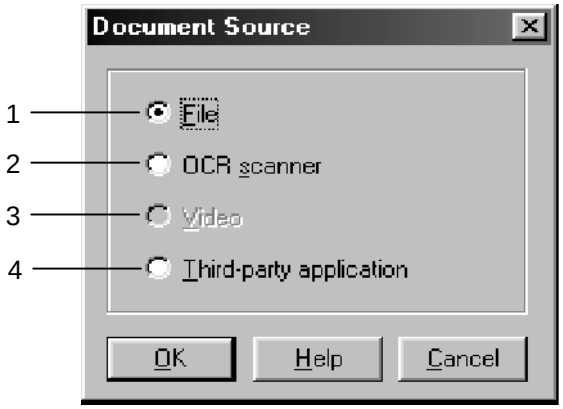
WINWORD,DOC,[DrDocTv.main()],[DrDoc.CONTINUESEARCH"%s"],[DrDocNew.main()]

Once you have defined all possible programs, you only need to left-click the respective required program for the current association and confirm the entry with "OK".

③ ▶ Determine document source:

Call "Settings/Doc.Source".

There are various options for creating documents. You determine the origin of a document to be archived with "Doc.Source"on the menu.



Select the required option:

1: already existing files of all types

2: Paper sheets (text+image) via a scanner; Buffer as image

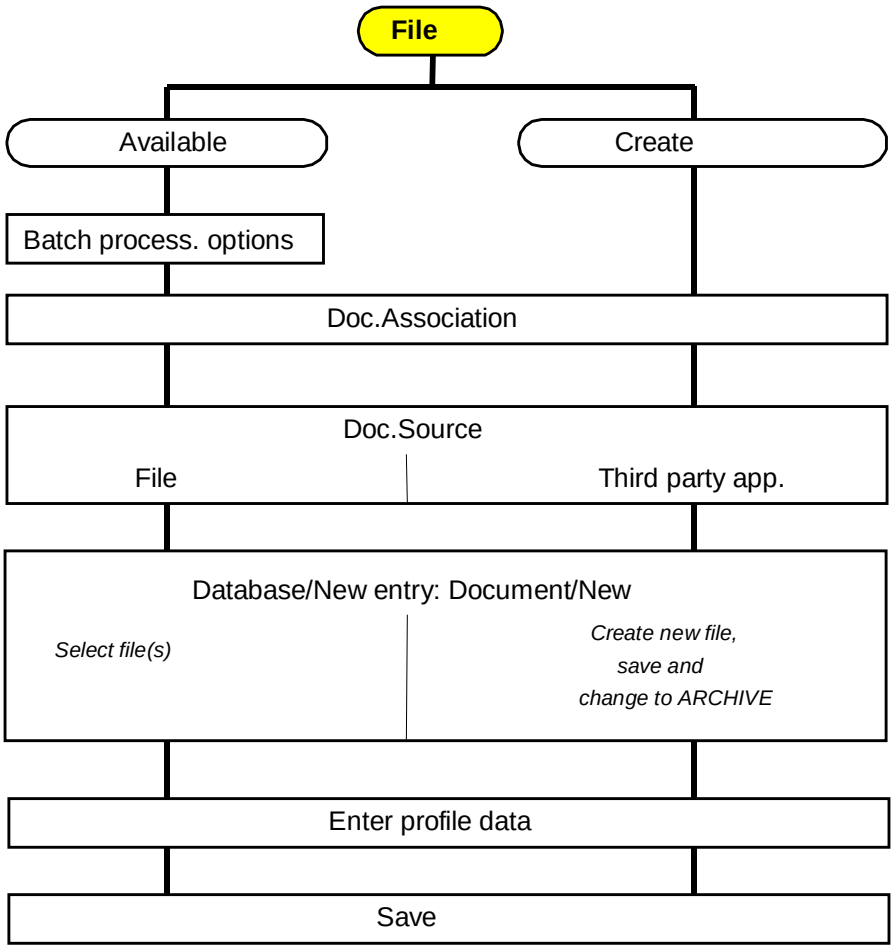
3: Paper sheets via a scanner with additional OCR processing

4: Recordings from moving or still video

5: A new file to be created with any third-party application (in contrast to no. 1), which is then to be archived immediately.

11.3.1 Archive files

Brief information



① ▶ Batch mode:

Step by Step

If a larger number of existing similar files are to be archived, you should consider whether these files
- should be processed in a batch
and/or
- whether they should be archived automatically.

Call "Settings/batch mode" and

➔ select "batch processing file"
➔ and/or "automatic archiving"
.

MORE INFORMATION ON THIS TOPIC IS INCLUDED IN CHAPTER:
- 11.3 ARCHIVE DOCUMENTS

② ▶ Doc.Association:

Call "Settings/doc.association".

➔ select the program, with which the file was created or is to be created, as source-app.
➔ select the program, with which the archived document is to be associated for any subsequent call, as view-app.

The "auto-associate app" can optionally also be selected as source-app and/or view-app. Dr.DOC® will then select the program, which works with the file name extension stated in file archiving as standard, as source or viewing program.

Example

You want to archive a file from a spreadsheet calculation.
Define the spreadsheet calculation as source. Select either the spreadsheet calculation or another program, e.g. word processing, as the view association for the archived document.

③ ▶ Doc.Source:

Call "Settings/Doc.Source".

➔ Select the "file" option to archive already existing files.

➔ If a file is initially to be created with another program, select the "third-party application" option.

④ ▶ Document/New:

Call "Database/new entry" on the menu bar.

➔ Activate the "Document/New" command.

For existing files (i.e.: Doc.Source "File"):

➔ Select the required file in the file selection dialogue. If batch processing is activated, several files can be selected in the list box. Confirm the selection with "OK".

For new files (i.e.: Doc.Source"third-party application"):

➔ The third-party application stated in the association is started automatically. Create the required new file and work with the program concerned as usual. When the file is complete, save it: To enable automatic processing (archiving), the file must be put in the local directory (as standard: c:\drdoc\tmp) and must be named archive.*erw* . Instead of *erw* enter the usual file name extension for the program concerned.

➔ Exit the third-party application or change back to Dr.DOC® with **ALT**+**Tab**.

The following steps apply to existing as well as newly created files.

➔ Enter the profile data (for options to simplify data entry, see chap. 11.2 CREATE PROFILE DATA).
If "batch processing" and "automatic archiving" are activated for existing files, you should be aware of the following:
As soon as you select "save" for the first time, batch processing and archiving will start. An individual record will be created for every file. Therefore please ensure that the profile data for every record is available and unique. The program offers various possibilities for this:
- The entries in the fields can be completely or partially maintained, as soon as a record is saved.
- Create automatic fields, e.g. a number generator and/or a field, where the file name is automatically entered.

➔ When the profile data has been entered, activate the "save"command. The selected existing or the newly created file is now linked with this data and filed as document.
In batch processing of already existing files, the next one will now be automatically made available for archiving. All you have to do is enter the profile data.
In automatic archiving of existing files, the batch is automatically processed and saved without further commands being entered.

Tip

Delete source file

The files, which are archived, are no longer required after successful archiving, as they are now managed in the "archive container". Memory space is also being saved, when these source files are deleted. You can (and should) do this manually from time to time. This deletion is automated, if the archive is equipped with the "delete source file after archiving" option (via the menu item "Management/edit archive parameter"). Every source file, which is being archived, will then immediately be deleted.

Example

A number of drawings were created for a project with a CAD system and arranged as files with unique file names. These files are now to be archived with as little effort as possible.

- For this purpose, the options "batch processing file" and "automatic archiving" are selected under the menu item "batch mode" as presetting.
- The "file" option is selected as "Doc.Source".
- The CAD system is selected as source and as view for "Doc.Association".
- In addition,

- the archive is equipped with an automatic field for adopting the respective file name.
- the entire profile data entries are maintained on screen (i.e. the setting "delete form after entering new record" is deactivated).

In the new entry, all required files are selected in the file selection dialogue and confirmed with "OK". Fixed data for all files (e.g. the project title, date etc.) is now entered into the profile data.
With "Save", each file is now automatically archived as a document. The profile data is changed accordingly only in the field for the file name (automatic field); the rest of the entries (project title etc.) is identical everywhere.

Tip

Image files with view-archive internally

Archive image files (e.g. TIFF, BMP) with the view-app "Internal", even if you may want to continue editing these later.

This link has several advantages

- When viewing the archived documents, you have quicker access via this internal "Viewer", as a third-party application is not started.
- Varied compression options are available.
- For further processing (and new archiving) set the view-app on the corresponding program and activate the "document/view" command to load the document (or the document page) into the third-party application.
  The program uses the associations for the original document when rearchiving the edited documents: i.e. the new document is also associated with the internal view as standard.

Tip

Browse images containing text,

CI documents can be browsed directly with text retrieval , i.e. you do not have to enter any further keywords or contents. This relates to text documents (e.g. word processing, spreadsheet etc.) as well as e.g. drawings of certain programs, provided these include text. A prerequisite is that the original program works in a vector-orientated manner (in contrast to raster-orientated programs).
It is a prerequiste within Dr.DOC® that the corresponding program is entered in the CI documents column and selected as association.

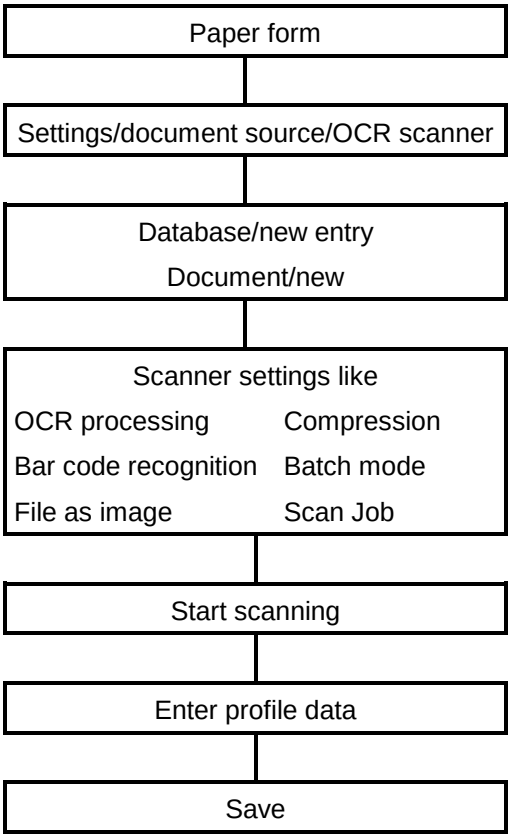
Tip

Automatic archiving after data transfer

If you have imported data from an archive (e.g. address management etc.) into your word processing system for example, the new entry of an archive can automatically be called up after exiting the word processing program to administer the text (e.g. document management). You enter the profile data of the document as described and

confirm the entry with "save". The document that has just been created in word processing is then automatically archived without further query.

11.3.2 Importing documents via a scanner



Text models can be scanned as images and edited using optical character recognition (OCR).

Dr.DOC automatically generates an image frame, which initially does not have to be defined.

Tip

The automatic image frame can be disabled via an archive.ini entry.
[SCANNER]
AUTO_FRAME=0

The OCR process has the advantage that in subsequent search actions the scanned text can be browsed directly (i.e. no further manual entry of keywords is required, in contrast to text that is archived only as image). The same applies to bar codes: The bar code can be recognized automatically by the program and - converted into alphanumeric code - can be entered in a profile data field.

Note

Prior to working with the scanner, make sure the correct scanner type is selected. Call up the "select scanner" command in the OCR module under general settingsto determine the scanner type. Left-click the appropriate name (for TWAIN then select the driver with "Selection") and confirm the selection with "OK".

11.3.2.1 Basics: Why OCR ?

Dr.DOC® allows you to archive any types of documents, e.g. models, files, audio and video sequences to be scanned.
If texts, e.g. incoming letters, invoices, newspaper cuttings etc., are imported via the scanner, "only" the image information is initially available to the archive, i.e. a digital copy has been created.

This image can be archived - but to be able to retrieve it, keywords must be entered, as a computer cannot recognize image (so-called NCI) information as text.

As the additional entering of keywords and brief content details is often taking up a lot of time, so-called OCR (Optical Character Recognition) is used. Such an OCR program can convert the image information (NCI) into computer-readable text information (CI) - and thus make it available for searches.

Performance of the Dr.DOC® OCR module?

The OCR module of Dr.DOC®...

- supports the so-called dynamic threshold value recognition (provided the scanner is equipped accordingly).
- can manage compound documents, i.e. documents with mixed image and text.
- can recognize bar code (currently check code 39, check interleaved 25, code 128, code 39 EAN 13, EAN 8 and interleaved 25).
- includes formular processing. That means: For regularly recurring models (e.g. delivery notes of a certain supplier), a "Template" can be created defining where the text to be recognized is located. For "unique" templates, text that does not have to be recognized, can be filtered out in this manner.
- automatically adopts the recognized text into the profile data of the record. The text can be split into several areas, which can be allocated to various profile data fields.
- can save all settings with various configuration names, so that the optimum configuration for each respective template can be called up immediately.
- processes not only newly scanned templates, but also existing image files, which contain text.
- has an internal clipboard for the template so that several workflows can also be executed one after the other without having to scan in the template again.
- also works independently with batch processing and automatic archiving (either a preset number of template pages is combined into a document or bar codes are used as document separator), which could save a lot of time.
- can for example be used for document management, press archiving, library management, inventory management etc.

Brief information

Procedure		**Commands in Dr.Doc®**
Define Doc.Source	→	Settings/Doc.Source: OCR Scanner
Batch processing?	→	Settings/batch processing (also possible later)
Call new entry	→	Create new entry/new document via icons
Check settings	→	• In the dialogue area “Settings” predefined settings or “Edit” (compression, OCR settings, scanner settings) • Select predefined in the “Frame” dialogue. For new definition of a frame -> scan first • Select options to be executed (OCR, stop word list etc., if a frame has not been defined yet, do not select anything!) • Make selection in the “Source” dialogue (ADF, flatbed, file...)
↓		
Scan template	→	“Start” -> template is displayed in the “image” window
↓		
If frame and processes were already selected, processes will be executed immediately.		
If frames have not been created or selected	→	• enter name in the dialogue area “frame” (if saving is required) • draw required frame in the “image” window • select frame type (OCR, image or bar code) • select the destination field in which the result is to be entered for OCR and bar code • Draw further frames and allocate definition, then “save” • Select required process option (OCR, bar code,...) • select “internal buffer” as source and activate processing with “start”
Check OCR result	→	• The result can either be checked and, if required, improved directly in the profile data or via “Result/edit OCR text” • If the result is not satisfactory at all “discard” select “edit” in the “Settings” dialogue and make adjustments in “OCR setting” or “Scanner setup”, e.g. resolution, brightness, contrast, etc.) and “Start” again
↓		
Scan more pages	→	With “Start” the previous page is automatically archived and processing of the new page is started
↓		
Enter profile data and save		

Tip

Advance planning facilitates the task!
As for all types of document archiving, it is surely also most effective for OCR processing, to process templates of the same kind one after another in one operation and then to proceed to the next batch of similar templates.
As a first step, arrange the templates to be scanned according to quality (brightness of the background and the font etc.), size of the template and other criteria, which varies from case to case. It may also be practical to sort the templates by content.
It is also possible to presort according to template type for automatic feed or the flatbed of the scanner, e.g. thin copies of delivery notes or newspaper cuttings are sometimes not suitable for the automatic feed (ADF) of the scanner.

11.3.2.2 Preset

Define some basic settings prior to entering a new record. These details, which are defined within the "Settings" menu on the main menu, can be changed at any time, even whilst entering the new record.

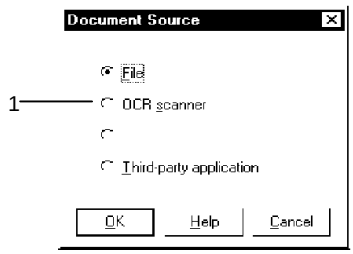
The following points should be decided in advance and the corresponding settings should be determined:

1. Document source
2. Document association
3. Batch processing

① ▶ Define document source:

Call "Settings/Doc.Source".

There are various possibilities for the origin of a document. You determine the origin of a document to be archived with "Doc.Source"on the menu.



1: The "OCR scanner" – document source applies to:

- scan with OCR
- scan without OCR
- OCR in files
- bar code recognition
- etc.

② ▶ Doc.Association:

Call "Settings/Doc.Association" and select as source and view-app image file/internal.

③ ▶ Batch processing:

If a larger number of paper templates is to be archived in the same way, you should consider whether these

- are to be processed as a batch (only possible for scanners with ADF).

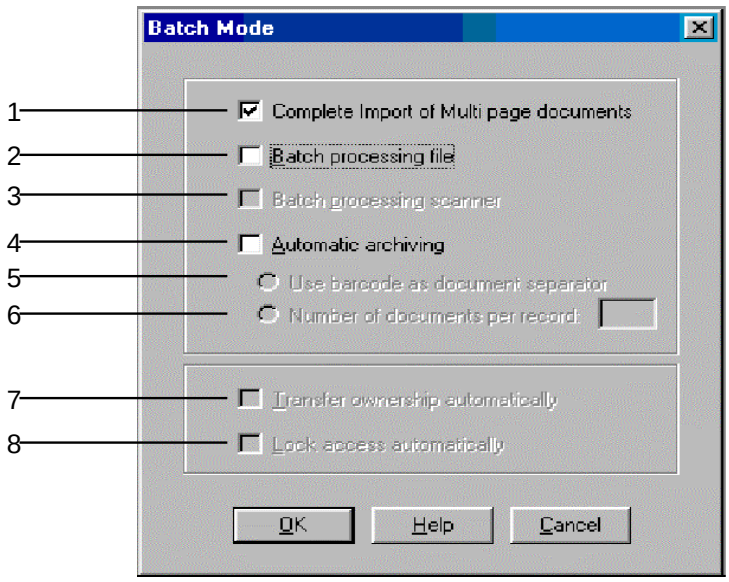
and/or

- whether they should be archived automatically.

Call "Settings/batch mode".

Note

The batch mode settings can also be called directly from the OCR module dialogue.



1: Multi page documents (e.g. TIFF files with several pages) are adopted in full, otherwise you have to confirm each individual page

2: Any files can be processed in batches. But please be aware:
- A document may only be created from one file (exception: NCI files, which are linked with the internal viewer). The other files selected in the batch are automatically displayed in the title line of the input window after the previous one has been archived.

3: Scanning paper batches automatically is only possible using scanners with automatic feed.

4: The archiving action for batch or individual processing can be further automated here. Files or model pages are archived in set intervals (see 5: and 6:) :
- automatic fields for user, date, number generator and in the case of files, the file name (Attention: if several files are combined into one document for the internal viewer, the automatic field "file name" will not be filled!).
- adoption of manual entries, which were entered in the first record prior to starting batch processing (possibly in connection with various automatic fields).

MORE INFORMATION ON THIS TOPIC IS INCLUDED IN CHAPTERS:

- 18.1.2 AUTOMATIC FIELDS
- 18.1.7 MAINTAIN FIELD ENTRIES ON ENTERING NEW RECORD

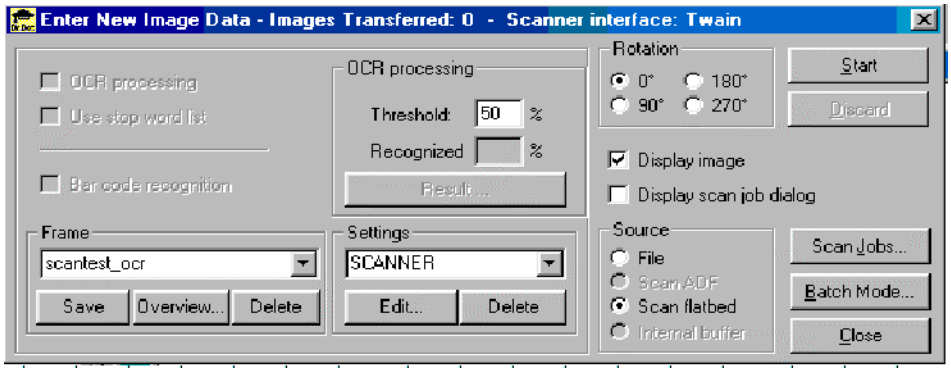
5: Bar code as document separator:
A new record is created, when the system recognises a barcode in the barcode frame when using batch processing and bar code recognition.

6: Enter the number of template pages, which are to be combined into a document. This information is relevant in conjunction with the automatic archiving.

7: You can only select this field, if you belong to an owner group, which is associated with the archive and if you have the relevant archive rights.

8: By activating field 8, “lock access automatically” can also be operated.

11.3.2.3 The functions of the OCR dialogue



▶ Editing Options

This column allows you to define the process to be executed.

- OCR processing/bar code recognition:
  Select OCR processing and/or bar code recognition , if required. If this/these option(s) are activated, they will be executed immediately after scanning, provided the relevant frame have been defined. If a relevant frame has not been defined yet, this can be done subsequently (see below).
  Further options for OCR processing are selected in the OCR module in the “Settings” dialogue “ edit/ OCR settings” (see below).
  The bar code can be used as document separator for batch processing (see “batch processing").

Note The following codes are currently supported as bar codes: Check code 39, check interleaved 25, code 128, code 39 EAN 13, EAN 8 and interleaved 25. If the bar code cannot be recognized, a message is issued. In this case, it is often enough to increase the bar code frame a little.

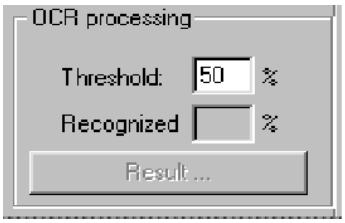
- Stop word list:
  A stop word list filters frequently occuring words, which are not search words, out of the recognized text (e.g. and, with, by, I, you, if, but, and in addition punctuation marks like full stops, commas etc.) so the profile data is not unnecessarily burdened, which is especially practical for large quantities of data. The other words of the text can of course also be searched as one pleases, when the stop word list is used. The entire text can be read - as generally recommended - in the archived image.
  A standard stop word list containing frequently recurring words is supplied. This list can be maintained and added to. It is also possible to create further stop word lists - this may be practical for use in different archives.

  The stop word list to be used (if selected), is defined in the OCR module in the “Settings” dialogue via “Edit/OCR settings” (see below).
  To edit or to create a stop word list, go to start menu/programs/Dr.DOC.

  Important

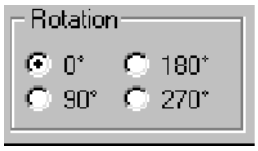
  The stop word list must never be edited with a Windows Editor, as it must be purely ASCII format.

- Dialogue “OCR processing”



After OCR processing is complete, the "recognized: %" field states the recognition quality in percent. A warning signal will alert you if this number is below the threshold (default setting 99.50 %) stated above. In this case, scanning and optical character recognition can be repeated with modified parameters.
You will receive a list of texts recognized in the document (subject to the number of current OCR frames) via “Result”. By selecting a line and clicking on “Edit OCR text”, the window is split into two. You will see the scanned image in the upper window while the lower part shows the recognized text.
To facilitate the comparison, the text in the image (upper part) is marked in yellow at the position where the cursor is located in the editable sector (lower part).

- Dialogue “Rotation”



A template can be rotated in steps of 90°. The rotation can be defined prior to scanning or calling the file, but is also possible subsequently.
The rotation is a component of the frame setting and is saved with these configuration names (see below).

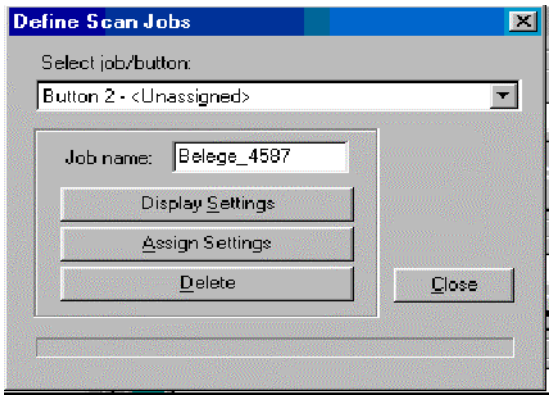
- Batch mode / display image:

You find explanations regarding the batch mode function in the previous chapter 11.3.2.2.

It can be particularly useful not to have the scanned image displayed in batch mode. Processing then takes place automatically in the background.

- Create new scan jobs / change / delete:

To define a new scan job, all scan settings have to be determined in advance. When this is completed, confirm the “Scanjobs...” button The following dialogue will appear:



- Job/check boxes selection
  Select one check box (5 possible boxes) for the new job.

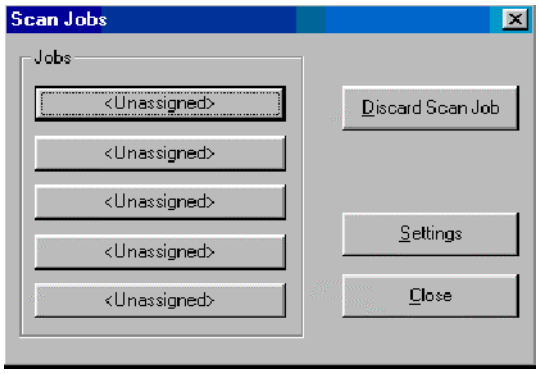
- Job Name:
  Change the name or enter a new one. If you are only checking the settings for a job or you want to assign modified settings, do not make any changes here.

- Display settings
  Here, you can view the scan settings for the selected job.

- Assign settings
  Here, you assign the current scan settings for the job selected above.

- Delete
  Here, the job assigned to the selected check box is deleted again. The check box is then available again for a new job.

- Start scan jobs:
  Activate “display scan job dialog” in the “enter new image data” dialogue and exit with “close”.
  If you now click on the icon for “Create new document”, the selection dialog for scan jobs will be displayed. If you then manipulate the button for the required scan job, the job will be started.

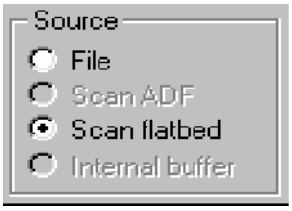


- Discard scan job
  Discards the current unsaved scan result (corresponds to “discard” in the “enter new image data” dialogue).

- Settings
  You reach the settings options of the “enter new image data” dialogue via this function.
  To continue, there are 2 options:
  - Deactivate “display scan job dialog” function
    If you now go to “close” and click on the icon for “Create new document” again, the normal “enter new image data” dialogue will be displayed again.
  - Change settings and return to the scan job selection dialogue with “close”.
    If the changes were not reassigned to the scan job, they will apply temporarily until they are changed again or this dialogue is restarted.
    If the changes were reassigned to the scan job, they will apply in future.

- Close
  Here, the scan job selection dialogue is completed. However, when you next click on the icon for “Create new document”, the dialogue will be started again until you deactivate “display scan job dialog” (see above)

- Template source



The following are available as template source : file (e.g. Tiff), scanner (ADF or flatbed) and internal buffer.

The program initially copies a read template to an “internal buffer” so that no repeated reading is required for further editing.
i.e. if you determine the frames after scanning, select “internal buffer” and click “start”. The optical character recognition is now executed via the data in the internal buffer and the document does not have to be scanned again.

- Frames

▶ Define frames

To edit a template, corresponding frames have to be set. That means: For OCR processing and bar code recognition, you have to define the section of the template to be edited and the profile data field where the result is to be transferred to. Another frame must be set for archiving the image.
These frames can be saved together under a configuration name (including the set rotation) and can then be called again as "template" at any time.

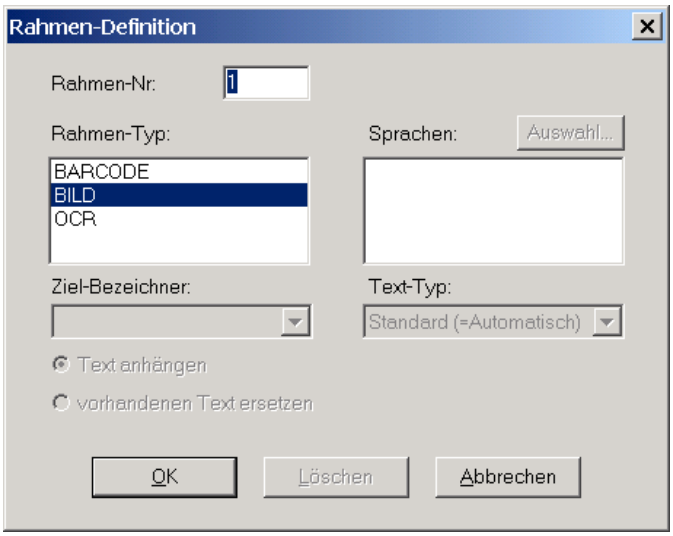
Proceed as follows to define the section to be edited:

① ▶ Scan template or call file, rotate if required.

The rotation setting is saved together with the frame configuration.

Important

② ▶ A frame is drawn between opposite corners with the left mouse button. If the mouse button is released, a definition dialogue appears:



- The **frame no**. is issued automatically.
- Select OCR, bar code or image from the list box of **frame types**.
- If the frame type is “OCR” or “bar code”, you must enter a **destination identifier**, i.e. a profile data field in which the data will be imported. All field names will be displayed in the list box.
- If the frame type is “OCR”, select the language for the template in the **Language** field via the selection button.
- The field **Text type** is also relevant for the optical character recognition.
  The text type is recognized automatically for most texts. Set to “Automatic” for this purpose. You can increase the recognition quality of texts from needle printers and typewriters, if you select “Typewriter” or “Matrix printer” (for needle printers).
  The OCR default settings appear in brackets ( ) for the “Standard” setting.
  The settings here overwrite the preset!

- For OCR and bar code you also have to select whether the text will be attached to any already existing entry or whether it will replace this entry. It is necessary to attach it, if it is an OCR text, which is split into several frames, but is to be entered in one continuous field (see Tip).
- With the "**delete**" button the entire frame is deleted.

Tip As the last tab in your set of tabs create a continuous field, which is called e.g. "OCR text", because most times an entire text complex will be edited with OCR, which is then entered here - possibly shortened by using the stop word list. This field is not meant for subsequent reading, therefore it can easily be in the background.

③ ▶ Confirm the details with OK. In this way, further frames can still be set.
Do not forget that you have to set one (or several) image frames to archive the image. An image will not be archived without an image frame.

If a frame is not positioned as required or is to be edited later, place the mouse cursor in this frame and press the **right** mouse button. The corresponding frame definition is called up again in this way and you can make changes or delete the frame.

▶ Save frame

If you want to save the frame configuration, enter a name in the OCR module in the dialogue section "frame" and activate "save".
It is also possible to display the individual frame definitions of a configuration in a table here with "overview".

Note

A frame configuration is archive-specific and cannot be transferred to another archive.

▶ Change frame / delete

If you want to change a frame configuration, call it up from the list box and click on “overview”. You will see a tabular view of the allocated frames. Select the frame you want to change. You can now make changes in the “frame definitions” dialogue or delete the selected frame.

▶ Delete frame configuration

To delete an entire frame configuration, select the required configuration. Click on “delete”, a selection dialogue will appear:

- **from the memory**: if the configuration was loaded and displayed on screen, but is not desired (i.e., it still remains on the list)
- **from the hard disk**: if the configuration is to be removed from the list.

Tips

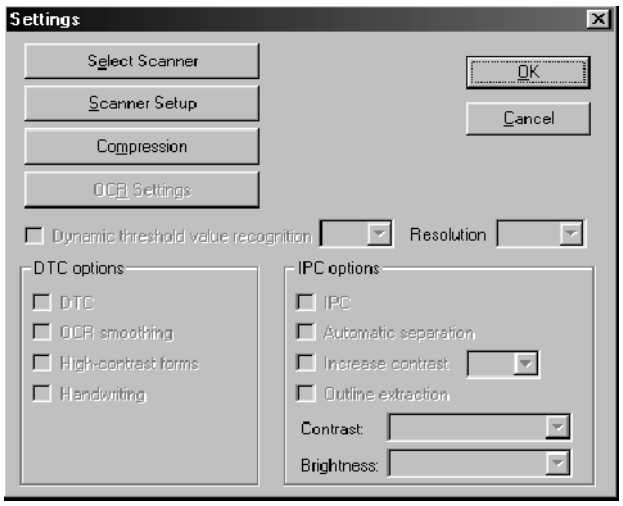
- Frames do not have to saved. You can also set frames for a unique action without giving it a name. This is the case for very different material, which is to be gathered in a derived manner.
- However, we recommend to create a comprehensive configuration, e.g. named "all". Set one OCR and image frame each across the entire template.
- Do not worry that too much may be edited in the OCR text through this action. It may take considerably more time to set individual frames for each template.
- Do not set the OCR frames too narrow. The models are always fed in differently by the scanner, but the template remains at the same position - in that way the required text may easily only be in the frame half and OCR processing is no longer possible. The same also applies to bar code frames.
- Therefore, in the case of close successive lines, do not attempt to define an individual frame for each line to place the texts in different fields. It is better to set a large frame over several lines and enter the result in a collective field - the text can be found in the same way and, of course, reading takes place in the image.

11.3.2.4 Global settings

The following basic settings can be saved as scan configuration:

- Scanner type (select scanner)
- Scanner settings (scanner setup)
- Compression
- OCR settings

It makes sense to create different standard settings. Enter a new name and activate "edit".



The direct settings in this dialogue are for KOFAX scanners. For scanners with TWAIN driver define your settings under “Scanner setup”. Your scanner documentation describes how to manipulate this dialogue.

- **Resolution:**
  As a rule, a resolution of 200-300dpi is sufficient for OCR (better 300 dpi). The available resolutions are subject to the scanner used. The resolution can also usually be determined directly in the "scanner setup".

- **Threshold recognition** (only for scanner types that are equipped accordingly):
  The value 0 is recommended for activated threshold recognition. Higher values (1-3) change the brightness.

- **DTC Options** (only for scanner types that are equipped accordingly):
  These options (Dynamic Threshold Circuit) apply to the text recognition and can considerably improve the OCR result for poor templates. If required, select DTC options and other options.

- **IPC Options** (only for scanner types that are equipped accordingly):
  These options (Image Processing Circuit) apply to the buffer as image. If required, select IPC options and other options.

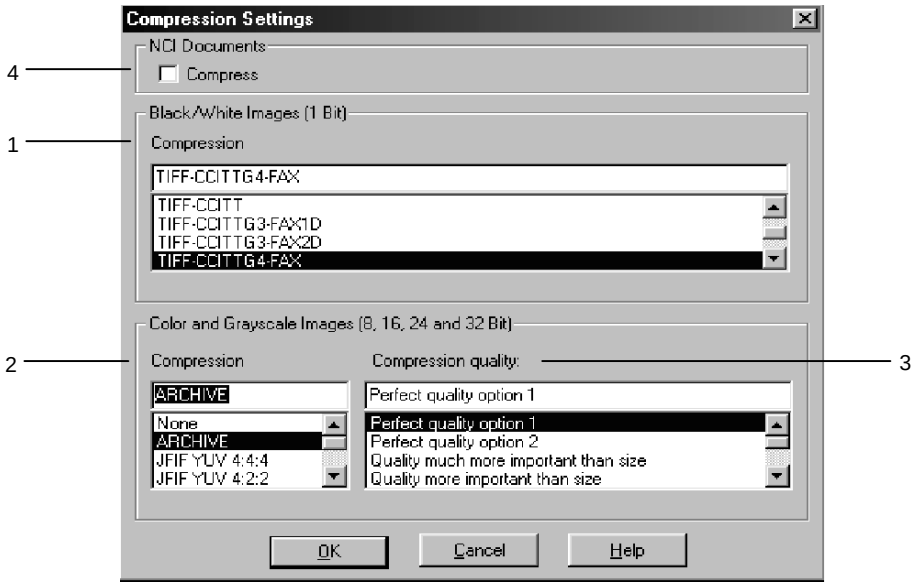
- **Select scanner:**
  Left-click the appropriate name (for TWAIN, select the driver with "Selection") and confirm the selection with "OK".

Note

If CFM-TWAIN drivers are not used and not all scanner functions are supported as a consequence, you should activate the check box "Scan via TWAIN dialog box" (Application example: with the HP-TWAIN driver, colour scanning is only possible with "Scan via TWAIN dialog box").

- **Scanner Setup:**
  You can define settings here subject to scanner type and driver.

- **Compression:**
  Compression is possible for black/white images and for color and grayscale images. You should basically be aware: the higher the compression, the bigger is the loss of quality when the document is called again!
  The best compression is on the one hand subject to the type of documents and on the other hand subject to the requirements made on image quality or memory.



➔ Call “edit/compression" in the "Settings” dialog.

1: For black-white templates, you can select between various TIFF compressions and Dr.DOC®-specific settings.

2+3: For color and grayscale images, the "ARCHIVE" setting is recommended, as in addition the compression quality can be set.

4: Basically only documents, which are archived with the internal app, are compressed. In addition, NCI documents with app to third-party applications can also optionally be compressed. Select the option, if required.

Note

CI documents are never compressed, as text retrieval can only be executed in uncompressed documents. If you do not require text retrieval, enter the corresponding program (e.g. word processing) additionally into the column of NCI documents, select this app and the compression option.

Determine the required setting by clicking on it and save with "OK".

Tips

Compression and scanner setting

- Experiment! There is no general recommendation for the right compression. It is best to try out various compressions with a template that is typical for your application and save the settings under an individual name before you proceed to actual archiving.

- In principle, it is best to have a different scan setting for various template types.

- You should also know: The optimum setting for OCR is not the optimum setting for the image. It is not possible to scan both most favourably at the same time, as the scanner has to be operated in a different way each time. If you nevertheless cannot or will not do without the optimum image quality, you have to scan the template twice - once with the OCR settings, once with the image settings.

- For the best text images you should decrease the contrast, select a high resolution, and, if possible subject to the scanner, dither. If the text images are to be shown on screen in best quality, the grey scale compression is recommended, as it is best to read. The disadvantage compared to TIFF compression: slightly fuzzy image on printout.

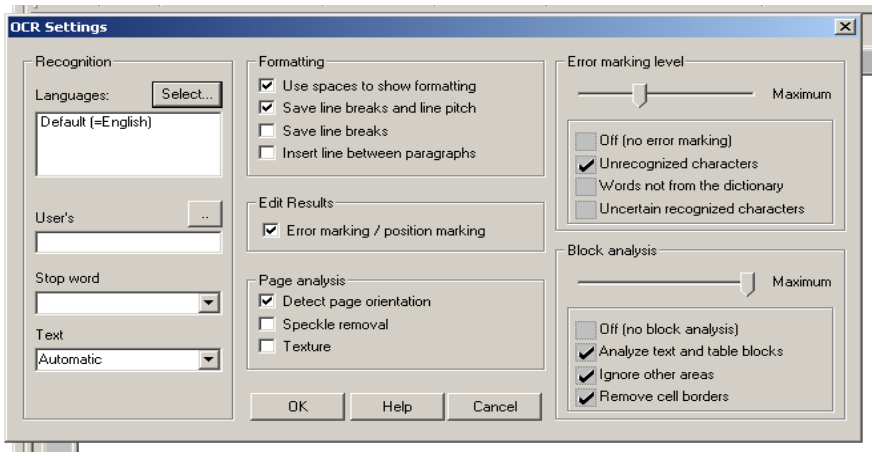
- If text images are only rarely required on screen or are to be at optimum quality in printout, TIFF compression is recommended. Here, small fonts can be relatively well read in printout.

- If black/white photos are to be archived, please observe the following rules, subject to scanner:

- A grey scale scanner reads the "black/white" template as grey scale image. You will achieve good results with 100-150 dpi, no dithering, JFIF compression and quality in accordance with selection.

- A black/white scanner takes the template as black/white image. You will achieve good results with 400 dpi, dither 2-3 and Dr.DOC®grey scale compression.

- **OCR settings:**
  You should check the corresponding settings for OCR processing.



Dialogue “Text recognition”:

- **Stop word list:**
  Enter the name of the stop word list here. Whether a stop word list is used, is defined in the OCR module dialogue itself.
  To edit or to create a stop word list, call the start menu/programs/Dr.DOC.

Important The stop word list must never be edited with a Windows Editor, as it must be purely ASCII format.

- **Typographical image:**

The text type is recognized automatically for most texts. Set to “Automatic” for this purpose. You can increase the recognition quality of texts from needle printers and typewriters, if you select “Typewriter” or “Matrix printer” (for needle printers). Settings regarding this, which were assigned to the “frame”, overwrite this setting.

Dialogue “Formatting”

Here, you can determine the settings concerning the formatting of the result.

Dialogue “Edit results”

Here, you can define whether you want text errors assumed by the system to be displayed for the direct processing of the result.

Dialogue “Page analysis”

Recognize page orientation
This is useful if the sheet is not straight.

Remove spots
Function to improve the result for older sheets or sheets that are not completely white.

Structured background
Function to improve the result for backgrounds that are not white.

Dialogue “Error recognition”

Functions for changing the error recognition.
This function can be switched in grades, by clicking on the line you step up to another grade.

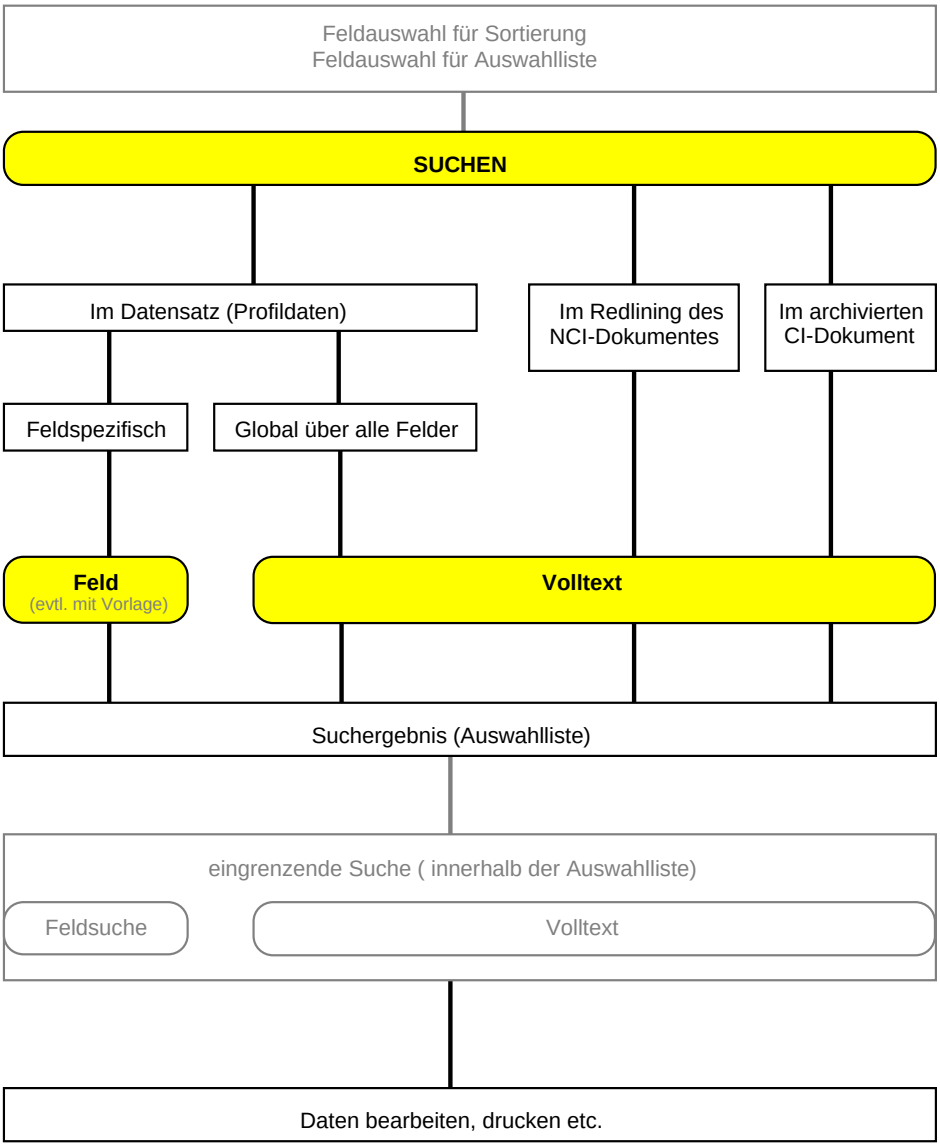
Dialogue “Frame analysis”

This function can change the OCR result. You have to make individual decisions to determine the setting that is most practical.
This function can also be switched in grades, by clicking on the line you step up to another grade.

If you have defined your settings here, confirm with OK.

12. FIND

12.1 General brief information



With the help of the **search fields** function you can carry out a field-orientated search for any entries of the archive. You can search fields via indexed and/or non-indexed fields. It is also possible to link search terms in various fields or logically within a field.

When you **search fields with template,** the search with a template containing predefined search criteria is started. This is useful if you frequently look for the same group of records.

Text retrieval gives you the option to find certain terms or parts of text field-independent at any position of the profile data or within CI documents or in the redlining of NCI documents in contrast to "search fields" .
For text retrieval, you can choose between standard search, phonetic search and error-tolerant search and limit the number of hits as a presetting.

These search functions can also be used in a **restricting search** (within the hits found) and in a **hypersearch** . This search automatically starts the basic searches in accordance with a previously determined definition either within an archive or across-archives, after the search actively selected by the user. In addition, a "loop" option can be selected, i.e., the search will continue until no more hits are found (recurse).

MORE INFORMATION ON THIS SUBJECT IS INCLUDED IN CHAPTERS:

- 12.2 OPTIONS FOR ALL BASIC SEARCHES
- 12.5 HYPERSEARCH

12.2 Options for all basic searches

Enter the data to be found as described in the following individual chapters. When the respective search action is completed, a record will appear on your screen if only one record was found or a select list will be shown if several records were found.
In the new appearance of **Dr.Doc**®, which is split into three sections from version 6.0 (tree view, selection list, record tab), the result on the selection list and the first record of the result can be seen on the record tab. The items “tree view” and “selection list” must be activated under “view” for this purpose.

Before you work with the search functions, you should read the following notes.

▶ Select selection list:

Call "Settings/field selection for / selection list".

➔ One or several defined lists will be displayed. Select the required one and confirm with "OK".

Note

You can predefine several lists under different names. Such a list can be created or changed at any time.

MORE INFORMATION ON THIS SUBJECT IS INCLUDED IN CHAPTERS:

- 14 SET UP ARCHIVE
- 18.2.2 ENTRIES ON THE SELECTION LIST

▶ Select sorting:

Call "Settings/field selection for/sorting".

➔ One or several defined sortings will be displayed. Select the required one and confirm with "OK".

Note

You can predefine several sortings under different names. Such a list can be created or changed at any time.

MORE INFORMATION ON THIS TOPIC IS INCLUDED IN CHAPTER:
- 18.2.4 SORTING

▶ Output duplication check:

Dr.DOC® can optionally do a duplication check when searching to stop the output of duplications on the selection list.

Example

An address management contains several records with various contact partners for each company address. A selection list should now only show each company once.
Another instance of output duplications is for example in the scientific sector: A biologist looking after a zoological collection would like to know which species are in the collection to create a so-called species list. Although there are 100 different dogs and 100 different cats in the collection, he would like to create a list, on which dog and cat are each only listed once. This provides him with an overview of the subject areas of his collection.

To use an output duplication check, call "Settings/field selection for/output duplication check". One or several configurations will be displayed. Select the required one and confirm with "OK".

The duplication check is either activated with the option in the search dialogue or with the corresponding icon.

MORE INFORMATION ON THIS SUBJECT IS INCLUDED IN CHAPTER:
- 18.2.7 OUTPUT DUPLICATION CHECK

▶ Restrict search:

A further restricting search can be carried out within the records found through a search.

Use the mouse to call up a search command from the main menu again without cancelling the selection list and enter more restricting search commands. The records selected from the selection list will be displayed in a new selection list. This procedure can be repeated as often as required.

Note

You return to the previous selection list with "cancel" or via the stop icon. However, the system only remembers the current and the previous list. So if you want to start a completely new search, click 2x on the stop icon to reach the **Dr.Doc**® basic window.

▶ Case-sensitive:

A case-sensitive search can be selected.
This setting can be changed in the respective search within the search dialogue or with the corresponding icon.

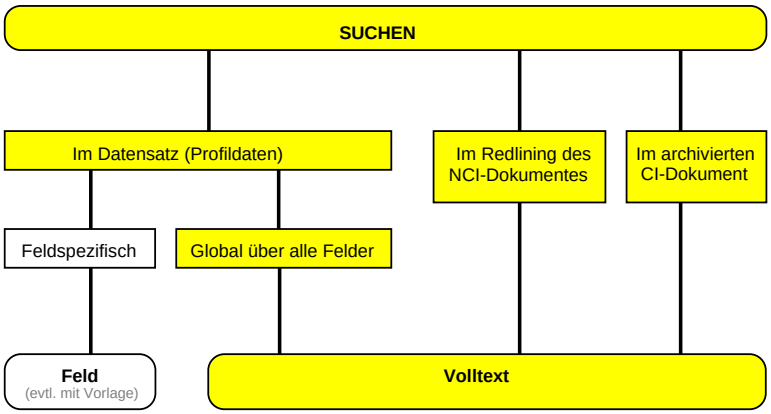
▶ Find current date:

You can search for this ”automatic field” in field, template and text retrieval.
The entry for the automatic field type (corresponding to field selection for automatic fields) is enclosed by ”%”.

Example

%D% is replaced by the current date.
(Apart from ”D” (Date), ”U” (User) and ”T” (Time) are also possible.)

12.3 Text retrieval



Text retrieval you can search:

- field-independent at any position of the profile data
- within CI documents
- in the redlining of NCI documents

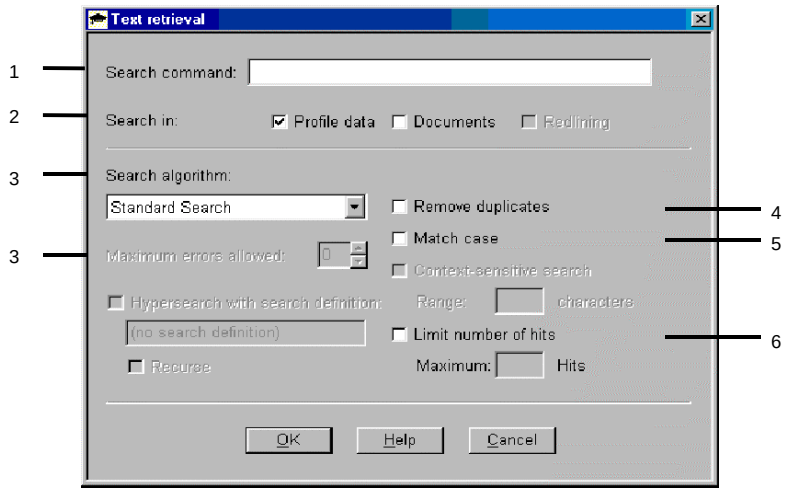
For text retrieval, you can choose between standard search, phonetic search and error-tolerant search and limit the number of hits as a presetting.

① ▶ Selection list/determine sorting:

In most cases, selection list and sorting are maintained. If you want to make any changes, you have to apply these changes prior to searching (See the previous chapter for a detailed description).

② ▶ Find:

Call "database/text retrieval" or click on the icon for "text retrieval".



1: Enter search term. You can

- search only for part terms (e.g.: Bow instead Bowman or Town instead New Town)
- enter several search terms and link logically. Use the following characters for linking and ensure that there are no blanks between search terms and association characters:

&	for "and"
|	for "or"
!	for "not"

to link operators, use the brackets **( )** .
In connection with an "error tolerant search" (see 3.!) the following entries are also possible:

?	as joker for one character
[ ]	for "classes": one of the characters in the bracket should be at this position in the hit
{ }	for "compulsory characters": these characters must definitely - despite permitted errors - be in the hit

Example

- With joker:

Ma?er finds Mayer, Maier, Maser, Mauer ...

- With classes:

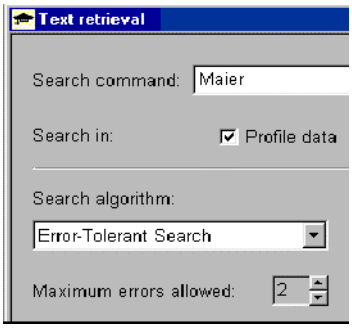
M[ae][iy]er finds Mayer, Maier, Meier, Meyer ...

- With compulsory characters:

{M}ei{er} finds Mayer, Maier, Meier, Meyer, Maxer, Moper, Mauer ...

2: Select what you want to browse: profile data, CI documents or redlining. You can also browse several data areas together.

3: Apart from the standard search, a phonetic or an error-tolerant search can be carried out.
The "phonetic search" setting looks for "phonetically-similar", i.e. for similar sounding words. The phonetic search is not case-sensitive. If you search for, e.g. "Mayer", you could get the following result: Mayer, mAIEr, Meir, Moier.
In the "error-tolerant search" you can also find records, where individual characters do not correspond to the search term entered with the help of the "permitted number of errors". The "maximum errors allowed" determines the maximum number of characters, which may be "wrong".



Example

This error-tolerant text retrieval with the maximum errors allowed 2 finds all records, which have field entries, e.g. "Meier", "Bayer", "Baier", "Fayer", "Mayer".

4: If the "remove duplicates" option is activated, only one of the records, which have the same entries in defined areas, is displayed (the prerequisites for such an output duplication check are in the previous chapter)

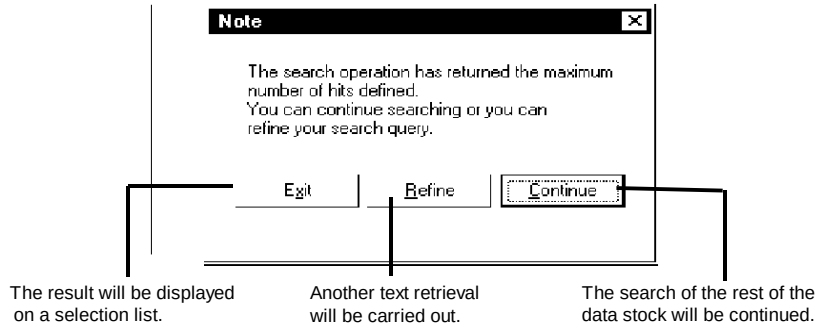
5: Select case-sensitive, if required.

6: The search time can be reduced for large quantities of data, if a search limit is entered.

Example

The stock management is looking for the article "mountain bike", which only exists twice. The number of hits in text retrieval is restricted to 2. As soon as the program has found two records with "mountain bike", it stops browsing the rest of the records and thus saves time.

If you work with a search limit and the stated maximum number of hits has been reached, you will receive a corresponding message.


Note
The search operation has returned the maximum number of hits defined.
You can continue searching or you can refine your search query.
Exit
Refine
Continue
The result will be displayed on a selection list.
Another text retrieval will be carried out.
The search of the rest of the data stock will be continued.

Note

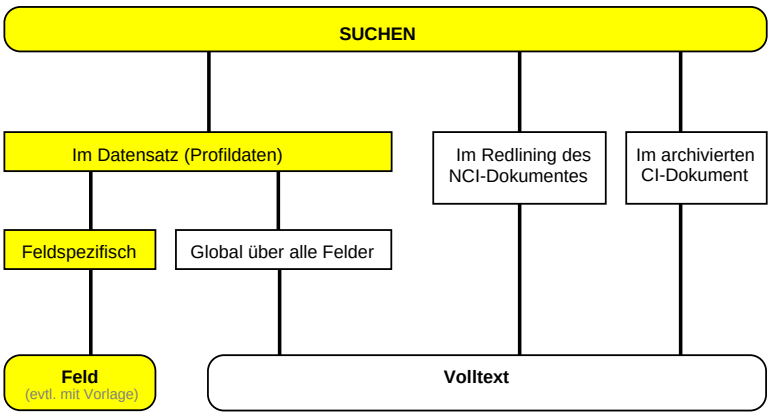
Entries in currency and date fields will only be found, if the search term is entered in the same way as the dates are saved in the relevant field (i.e., an abbreviated entry of the currency or of a date is not possible).

Start the search action with "OK".

Example

You will find examples for all search types at the end of the FIND chapter.

12.4 Search fields



With the help of the "search fields" function, you can carry out a field-orientated search for any entries of the archive. You can search fields via indexed and/or non-indexed fields. It is also possible to link search terms in various fields or logically within a field.

① ▶ Selection list/determine sorting:

In most cases, selection list and sorting are maintained. If you want to make any changes, you have to apply these changes prior to searching. (You find a detailled explanation in the previous chapters.)

② ▶ Find:

Call "database/search fields..." or click on the icon for "search fields".

➔ Enter search term(s) in the fields. The following entries are possible:

- **Find certain entries in a field:**
  Enter the search term in the respective field. You are searching all records, which have the entry "Maier" in the name field.
  Fields defined as range data type are a special case : you can find a value here, which is within the stated range.

Example

You are looking for 1830 and also find records, which include the entry 1815-1864.

- **Finding parts of words:**
  You find parts of words with the help of ***** , which you can use as "joker" at any position:

Example

Mai*	finds all records starting with "Mai" in the field concerned
*aier	finds all records ending with "aier" in the field concerned
aier	finds all records showing the entry "aier" in the field concerned at any position.

- **Finding any field entries:**
  If you only enter ***** in a field, all records containing any entry in the respective field are selected.

- **Finding entries between two stated limits:**
  Enter the marginal data separated by **<->**. You can for example look for entries within a certain period or for number entries, which show a turnover between 1000 DM and 2000 DM (1000<->2000).
  There is also the option to find strings. Search combinations are available as in the following examples:

Example

Alfred<->Berta	finds all names from Alfred to Berta
D*<->H*	finds all names starting with letters from D to H
B*<->*	finds all names starting with letters from B to Z
<->M	finds all names starting with letters from A to M.

  For the range search of numbers or dates the data type of the field concerned must be defined as number or date.

- **Find date range – relative to the system date**
  %D-1%<->%D+1% finds all records containing a date entry “1 day before” (%D-1%) and “1 day after” (%D+1%) the current date. This is useful for example for resubmission periods.
  If you only look for %D%, you will find all records containing the system date in this field

- **Find check boxes:**
  - Check box is grey: the entry is ignored (standard)
  - Check box is selected: All records with selected check box are searched.
  - Check box is not selected: All records with blank check box are searched.

  Click on the check box to activate or deactivate it.

MORE INFORMATION ON THIS SUBJECT IS INCLUDED IN CHAPTER:
- 18.1.1 DATA TYPES

- **Find number and term combinations:**
  You have the option to find combined field entries where all of the search criteria entered must be met.

  You can for example look for all records, where the name starts with "Mai*" and where the turnover is between 100 GBP and 200 GBP.

  Enter the word parts or entries in the respective fields, which are between two stated limits and start the search action with "OK".

- **Logical operators:**
  The following characters are available to logically link various search terms in one field:

&	for "and"
|	for "or"
!	for "not"

  Use the brackets **( )** to link operators and for logical delimitations.

  Ensure that there are **no** blanks between the search terms and the association characters. Linking the logical characters with * is not

necessary: As soon as you search with one or several logical characters, the term is automatically searched at any position in the field concerned.

Note

Logical links can only be stated in one single field in a search.

For an excluding search, **!** is entered (without blank) in front of the character or word concerned. The excluding search can be linked with the other search options.

Example

!Meier	finds all records that do not have the entry "Meier" in the field concerned.
!*Meier*	finds all records that do not have the entry "Meier" at any position in the field concerned.
!Meier&Huber	finds all records that do not have the entry "Meier"at any position in the field concerned, but the entry "Huber"
!Meier&!Huber	finds all records, which have neither the entry "Meier" nor the entry "Huber"at any position in the field concerned
!*	finds all records that have no entry in the field concerned

Enter the search term(s) with the described options.

➔ Carry out duplication check: If you start the search with a duplication check (icon), only one of the records that have identical entries in defined areas will be shown (the prerequisites for this output duplication check can be found in the previous chapter).

➔ Start the search with the icon or with "find/start".
After the search a selection list or a record meeting the criteria will be displayed.

Note

When fields in tables are searched, each existing line of the column is searched for the search term.

Tips

Search date field

Enter the date in abbreviated format - it is not necessary to enter the saved format DD.MM.YYYY in full. If you for example enter 020894<->010395 in a range search, then Dr.DOC® looks for all date entries from 02/08/1994 to 01/03/1995.

But if you want to search the date field in connection with the asterisk, you have to correctly enter the rest in long format.

Search fields in the currency field

Enter the amount without blank. But if you want to search the currency field in connection with the asterisk, you have to correctly enter the rest with a blank.

Search fields with Thesaurus

If you work with a Thesaurus, you can also use it for the search. Apply the entries as described in the new entry and then start the search. This saves on typing and avoids a record not being found because of an erroneous entry.

Save recurring field search queries

There are certain search queries that you will repeat. In such cases it is considerably easier, if you save the search query as search template under a unique name.
You save a search query under "Settings/field selection for search templates"..
At first, enter a name for the search and then activate the command "Edit". Now enter your search terms as you would for a normal field search. Confirm with "OK".

To use the search template, call the menu item "database/search fields with template" (or click on the icon), select the corresponding name and start the search with "OK".

Example

You will find examples for all search types at the end of the FIND chapter.

Examples for all search types

The following examples illustrate a wide variety of search options with the help of project management.

- *Question: What has Mr Brown, the officer dealing with the project, archived with regards to project New Town?*

Entry in text retrieval, find in profile data: Brown&New Town (will also find the records showing Mr Brown not as the officer, but e.g. noted in a comment. In any case, each record contains both terms: Brown and New Town)
Entry in search fields: In the project field: New Town ; In the officer field: Brown
(Only the records which have the relevant entries in both fields will be found)

- *Question: What has Mr Brown worked on?*

Entry in text retrieval, find in profile data: Brown (will also find the records showing Mr Brown not as the officer, but e.g. noted in a comment; or data from various projects)
Entry in search fields: In the officer field: Brown
(will only find the records, which explicitly state Mr Brown as officer in the field concerned)

- *Question: What has Mr Brown worked on and what is available regarding project New Town?* (i.e. you are looking for Brown or New Town)

Entry in text retrieval, find in profile data: Brown|New Town (will also find the records containing Brown or New Town e.g. in the comment)
Entry in search fields: In the project field: New Town
At first you will find all records regarding project New Town with various officers. Do you now want to differenciate further, e.g.: ... and which of this data has Mr Brown edited?, then you select "search fields" again on the main menu and enter Brown in the officer field. The selection list for the project New Town is then searched again and a new selection list with all records, which Mr Brown has worked on with regards to project New Town, will be displayed.
The reverse case is of course also possible: You enter Brown in the officer field and initially find all records concerning various projects, which Mr Brown has worked on.

- *Question: What have Mr Brown and Mr Jones edited in the project New Town?* (i.e. you are looking for Brown or Jones and the project New Town).

Entry in text retrieval: (Brown|Jones)&New Town
(You find all records containing e.g. one of the three search terms in the comment. But in any case the records contain either "Brown and New Town" or "Jones and New Town").
Entry in search fields: In the project field: New Town; In the officer field: Brown|Jones
(You find all records regarding project New Town, which have either been edited by Brown or Jones.)

- *Question: What has Mr Brown contributed to the project New Town in the first six months of 1994?*

Entry in search fields: In the project field: New Town ; In the officer field: Brown; In the date field: 01/01/1994<->31/06/1994. (The date can also be entered in a shorter form - e.g. 010194<->310694)

- *Question: What has Mr Brown written at any time with regards to project New Town in a report on the subject of estimate of cost?*

Entry in text retrieval, find in documents:
Brown&New Town&estimate of cost
(You find all records containing the entries Brown and New Town and estimate of cost in an archived document. But you will not find the records, which have the name Brown only in the profile data.)
Entry in text retrieval, find in profile data and in documents:
Brown&New Town&estimate of cost
(You find all records containing the three search terms in profile data or document.)
In this case, text retrieval only in profile data or the field search is not sufficient, especially if the archived texts were not keyworded further.

Tip

Effective search queries

The following generally applies:

- Do not spend too much time thinking up an exact search query just to find a certain single record.

  Take advantage of only having to enter partial terms, even if you exactly know the complete search term - e.g. it is sufficient to enter Bro (or Bro* for the field search) to find "Brown". In the "worst" scenario, you will get some additional hits in the select list, which you did not actually want to find.

- It tends to be quicker to initially search not too specifically and to restrict the hits again through another search if required.

- Instead of starting several search queries one after the other, it may be faster to link these search queries and then to select the respective queries to be processed on the select list, as different processes are required with the respective records (example: an order confirmation is to be sent to companies A and B, a inquiry is to be sent to companies C and D. Find all four companies in one go; at first select companies A and B and complete the order confirmation, then select companies C and D and complete the inquiry.).

12.5 Hypersearch

A hypersearch automatically starts the basic searches in accordance with a previously determined definition either within an archive or across-archives, after the search actively selected by the user. In addition, a "loop" option can be selected, i.e., the search will continue until no more hits are found (recurse).

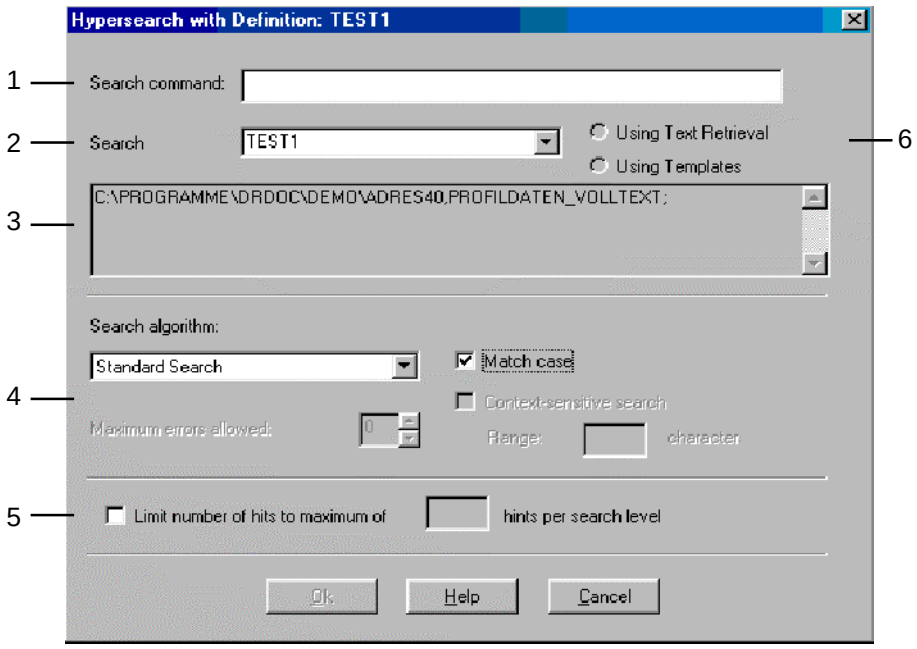
DEFINITION INFORMATION IS INCLUDED IN CHAPTER:

- 18.2.8 DEFINE HYPERSEARCH

Step by Step

① ▶ Start search:

Call the following dialogue via "database/hypersearch".



1: Enter search term
2: Select predefined search

MORE INFORMATION ON THIS TOPIC IS INCLUDED IN CHAPTER:
- 18.2.2.1 Create new search

3: Shows the setting of the selected search
4: Select required search algorithms
5: If a hit limit is required, the field for the number regarding the entry is released
6: Shows whether the selected search is a text retrieval or a template search.

The search is started with “Ok”

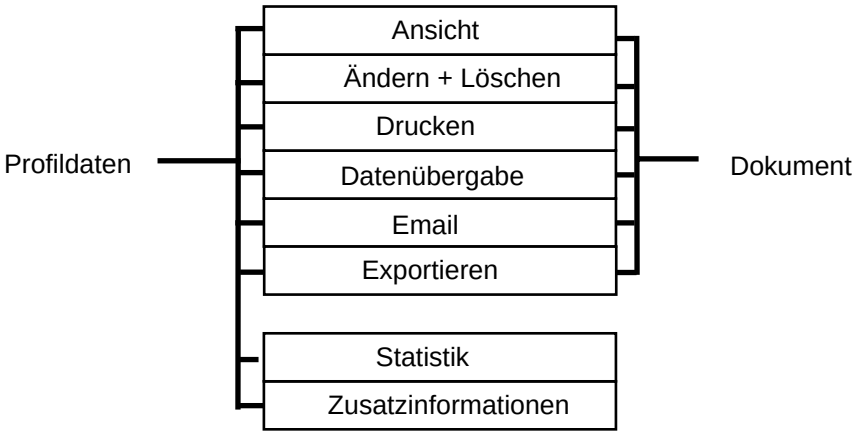
② ▶ Second option for starting a search:

Select a search type (field or text retrieval) on the "database" menu, enter search term.
Select the "hypersearch with search definition" option in text retrieval and if required "recurse".

Activate the hypersearch icon in the field search and if required the hypersearch recurse icon.
Start the search with "OK".
After the "basic search" the defined hypersearch is now carried out and a result list will be displayed.

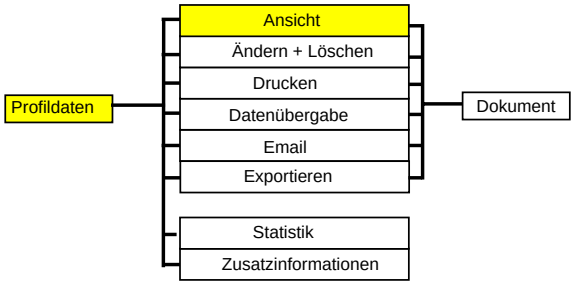
13. EDIT AND EVALUATE

Brief information



13.1 View

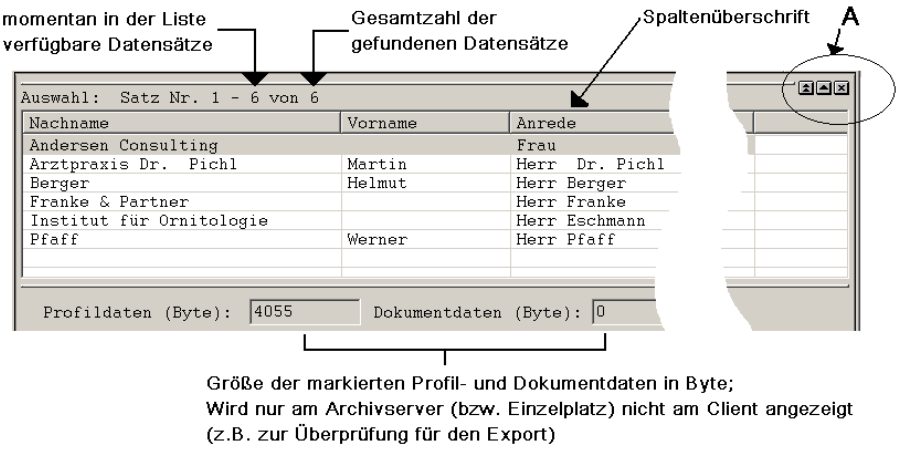
13.1.1 Profile data



The records found are displayed in the select list.

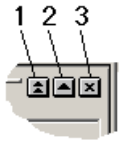
MORE INFORMATION ON THIS TOPIC IS INCLUDED IN CHAPTER:

- 18.2.2 DETAILS IN THE SELECT LIST



The view functions within the select list:

A:



1: Enables and disables the buttons shown below
2: Turns the select list into an independent window
3: Closes the select list

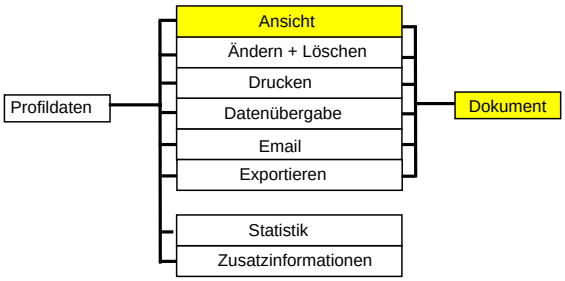
1: With "|<" and ">|" you reach the beginning or the end of the select list.

2: The maximum number of the entries shown in the select list The default setting is 100. This entry has no influence on the number of records found, but only on the speed of the display or for browsing the list and the records. The commands "<" and ">" activate the next 100 (or the stated number) records found. (Note: The maximum number is changed on the menu item "Management/edit archive parameter".)

Within this maximum number you can also work with **IMAGE** ↑↓ , **Pos1** and **End** as well as (with the mouse) with the scroll bar.

The selected record is shown in the record tab underneath the select list.

13.1.2 Document



The document associated with the record is always called via the "document/view" command.

The association, which was determined when the document was archived, now applies to this view.

But you can also temporarily create another association for the document than the archived one.

Example

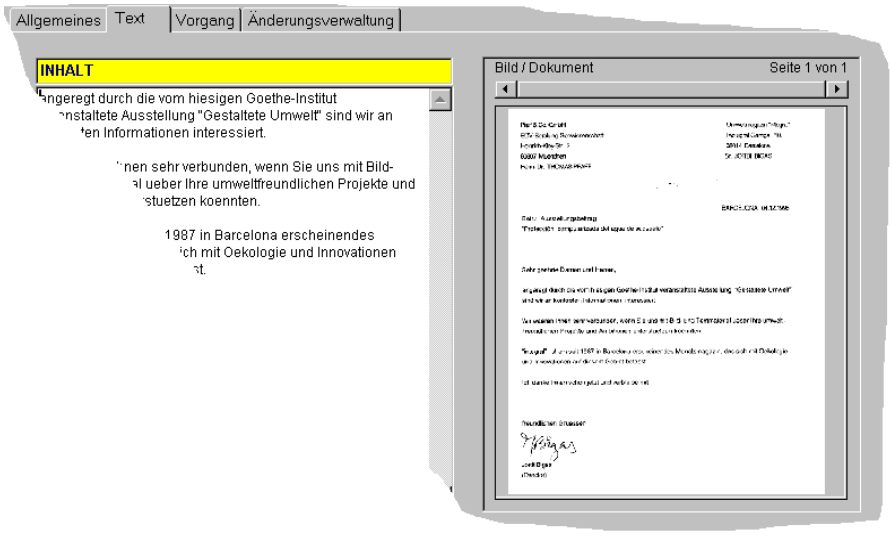
Change view app

A file with measured values was associated with a simple 2D drawing program on archiving. But the data is now also required for a 3D drawing program. The record is called up for this purpose and on the main menu the command "Settings/Doc.Association". The 3D program is selected as view app.
With "document/view" the document is now called up with this temporary new association.

Note, the document continues to be associated with the original program, i.e. the newly selected association is not saved.

▶ Small image/large image:

If the mask of the archive is set up accordingly; the element "small image" can be seen.



Note

If the image element is not present in the mask, it can be added subsequently at any time. See chapter 14.

To activate the small image immediately on calling the record, the option "view/display small image automatically" must be selected. If this option is not selected, you have to at first double-click in the empty small image frame.
The small image contains a preview for documents,

- which are archived with the internal view,
- and the program name for documents, which are archived with a third-party application.

If the small image is displayed, a double-click in the small image element will call up

- the large image in internal view (own window)
- the corresponding program with the document in external view

.

The large image or external view can also be called - independent of the small image -

- with the menu item "document/view"
- the icon
- for internal view, automatically when calling the record with the menu item "view/display large image automatically".

▶ External view via third-party application:

If the view app is another application program, the third-party application concerned is always called with the document.

Tip

Always close documents

Please ensure that you always close these documents in the third-party application again before returning to Dr.DOC® to avoid possible messages when the document is called up again. The program itself does not have to be exited, if it is DDE capable. That way you do not need to restart the program for another document - it is simply loaded into the already started program.

Tip

Screen setup

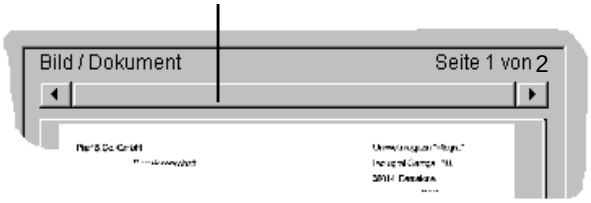
It may be helpful to arrange various applications next to eachother on screen. If you want to view several documents one after another for example, which are all associated with a word processing application, arrange the windows of Dr.DOC® and the word processing application next to eachother or underneath eachother to view the documents quicker.

▶ Internal view:

If the document was filed internally (e.g. an image file or a scanned template), the following functions are available for the view:

Small image (preview):
Display automatically when menu item "view/display small image automatically" is selected or with double-click in the image element.

You can browse the pages of
the document with the scroll bar.



Large image:

On the "view" menu you can basically set

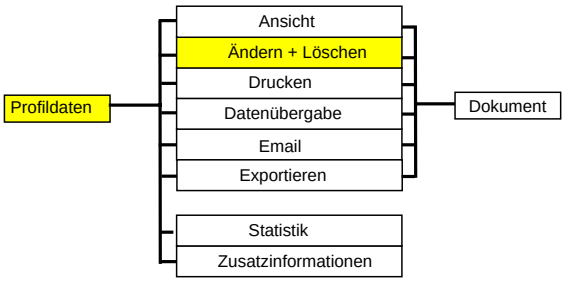
- whether the large image is to be displayed automatically as soon as the record is called
- whether it is to be automatically in the foreground (independent of this you can define the stacking of windows on the "Window" menu)
- whether image and window size are to be identical (i.e., if the window is enlarged or reduced, the image is also enlarged/reduced accordingly).

You can find more view functions on the "document" menu and partly as icons:

- "Display": Shows the large image (if it is not automatically displayed)
- "Large image/next" and "Large image/back": Browse several document pages
- "Large image/rotate": The current document page can be rotated by 90°.
- "large image/zoom": The document page or also sections of it can be zoomed smoothly. Enter the required percentage in the query.
  If a section is to be zoomed, you have to first determine the section. Click in the left upper corner with the left mouse button, hold the button down and drag the frame to the required size. Then press the right mouse button, so only the section is displayed.

13.2 Change and delete

13.2.1 Profile data



The most commands are available on the selection list as well as in an individual record called for viewing. By clicking and selecting individual records with the left mouse button, another selection can be made within the selection list for the required process.

13.2.1.1 Work mode

There are several possibilities for defining in how far a user may change data of an archive:

- Edit entry under the menu item "management/archive parameter " for the "changes after program start possible" option:
  - If the option is not activated, you can view the records and use them to transfer data, print out etc. Users cannot make changes or delete records.
  - If the option is activated, the records can be changed or deleted.

- In addition, the entries that may be viewed and/or changed by the user are determined subject to the user's access rights.

MORE INFORMATION ON THIS TOPIC IS INCLUDED IN CHAPTER:
- 16 USER SET

13.2.1.2 Changes in the individual record

➔ Call required record or select on the list, the record appears in the record tab.

➔ Add, change, delete text.

Tip

Entry simplification for profile data changes and -additions: Use Thesaurus

Thesaurus entries can also be adopted here as in the new entry, if the prerequisites are met. Chapter 11.2 CREATE NEW PROFILE DATA explains the process in detail.

➔ Apply changes with "save".

13.2.1.3 Delete individual record

➔ Call required record and activate the command "record/delete".

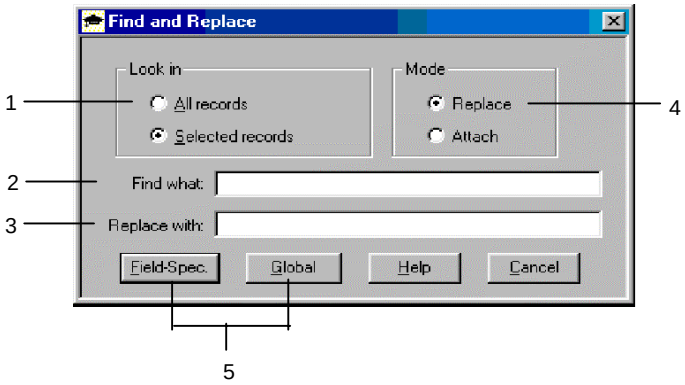
➔ Or: Select the record on the list and activate the command "delete".

.

13.2.1.4 Find and replace

➔ Select records where the same change is to be applied on the selection list.

➔ Call the function "record/replace".



1: State whether you want to edit all records of the list or just the selected ones.

2: Enter the search term. Apart from entering complete words or parts of words, the following options are available:

*	for any entry
^*	for finding the asterisk *
^^	for finding ^
#*n*#	for finding ASCII values. Instead of *n*, enter the corresponding value (e.g. #20#)

3: Enter the term for replacing the search term or for attaching to the search term. Apart from entering complete words or parts of words, the following options are available:

!*	for deleting search term or field contents
^!*	for replacing with !*
#*n*#	for replacing with an ASCII value. Instead of *n* enter the corresponding value (e.g. #20#)

4: Select whether the search term is to be replaced or whether the entered replacement term is to be attached.

Note

Within a table, "attach" inserts a new line.

5: If you only want to execute the action in certain fields, activate "field-spec..". Enter any character in the fields concerned and start with "OK".
If the action is to be global across all data, activate "Global".

Example

In an address management, the abbreviation "str." is to be replaced by "street". For this purpose search and replacement terms are entered as in the above illustration. As the action is only to be carried out in the "Street" field, the input mask is called with "field-spec." and any character is entered in the "Street" field.

Tip

Stop changes to automatic fields

If an automatic field - user, date and/or time is set up, it is of course also changed for changes in a larger number of records. As this is not necessarily required, it is easiest to take out the respective entries prior to the change in the menu item "Settings/field selection for automatic fields". After the changes, enter the respective automatic fields again.

SEE ALSO THE CHAPTER:

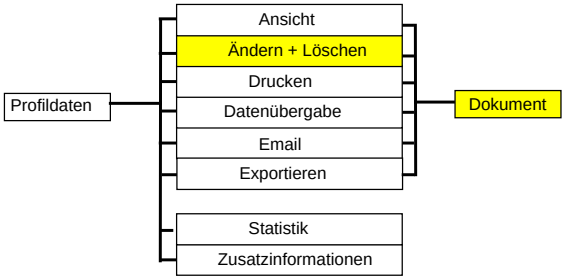
- 18.1.2 AUTOMATIC FIELDS

13.2.1.5 Delete several records

➔ If several records are to be deleted (incl. document), select these on the list and activate the command "delete" and then the option "delete selected records".

If the entire select list is to be deleted, select all records.

13.2.2 Documents



With regards to documents, the following changes are possible:

- Change and rearchive, optionally with version management
- Add annotations (redlining)
- Delete
- Rearchive documents subsequently
- Extend existing documents
- Lock or release documents (version management)

13.2.2.1 Change and rearchive documents

In principle, documents once archived cannot be saved in the same record, but only as a new record for security reasons.
Exception: the archive is set up with version management. Then every document can have draft and release status. This particular case is described in chapter 13.2.2.6.

➔ If the view-app is internal, you have to first change it to another view-app for a program, which can display and edit the image.

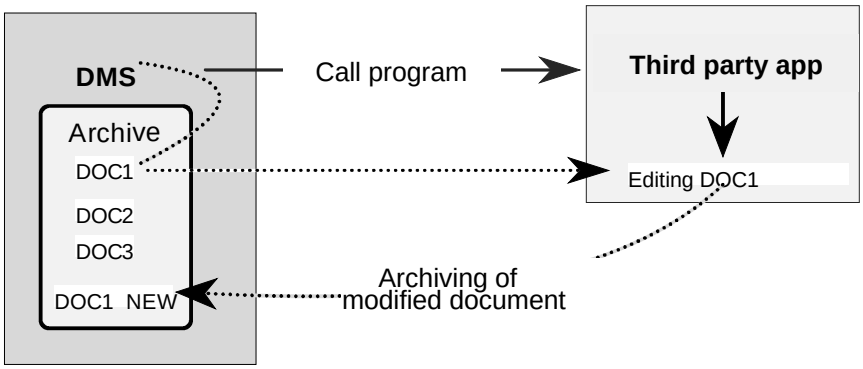
➔ Call the document with "document/display".

➔ You can now make the required changes in the third-party application. Save the modified document. Ensure that you save it under the predetermined name document.*erw* in the predetermined directory.

➔ Return to the archive with **ALT**+**Tab**. This will initially display the record of the original document and the query whether the modified document is to be rearchived, which you confirm with "Yes".

➔ A new record is now automatically created. The document is archived with the same view-app, which the original document has (i.e. if this app is internal for the original document, then the new document is also archived in this way - even if it was edited in another program).
The profile data is also adopted. If required, you can make changes.

➔ Archive the new record incl. document with "save".



Tip

Avoid errors with duplication check

If a single or duplication key exists in the profile data, change the profile data for the new document (without saving) before you call the document for editing, as otherwise a (justified) message will appear when you try to archive the new document.

If the error does occur, immediately carry out the following action:

Change the profile data (without saving), call the "record/new" command, then the "document/new" command and archive the modified document. You will find the modified document in the local working directory with the name document and the extension of the third-party application, in which it was created. If you do not know this extension, call (without leaving the new entry!) "Settings/Doc.Association"on the main menu. The relevant extension should be stated here behind the program name.

13.2.2.2 Add annotations (redlining)

For documents, which are archived with the view-app INTERNAL, annotations can be added subsequently. These annotations (redlining) can

- be created in various typefaces and colors
- be shown or hidden in the document view
- be made visible for various groups, i.e. the visibility can be restricted for groups and all entries within a group can be viewed by anybody.
  (You determine the setting in the user manager/ groups/ right/ record rights: redlining/ create, print, view.)

MORE INFORMATION ON THE SUBJECT OF USER SET/USER GROUPS IS IN CHAPTERS 16.2 AND 16.3

Tip

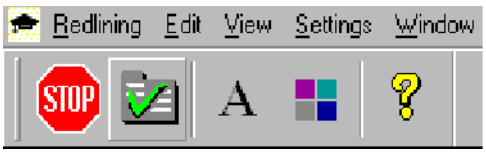
Every user should have an individual font colour to delimitate the entries of different users.

Chapter 14 describes how the redlining function is activated for the archive concerned.

Step by Step

① ▶ Activate the large image view of the document you want to equip with annotations.

② ▶ Start the redline editor with the menu item "document/redline editor" or the key combination **Ctrl + R**. The menu and the toolbar change:



③ ▶ Select the typeface and color for your annotation with the corresponding icon or the menu items "Settings/typeface" or "Settings/typecolor".

④ ▶ Place the mouse cursor at the position in the document where the annotation is to be entered and click the left mouse button. When the cursor flashes, you can enter the text.

⑤ ▶ For the next annotation you again place the cursor at the required position.

⑥ ▶ The entries can also be edited subsequently: click in the text with the mouse. As soon as it is framed, you can make changes or format the text (typeface, color).
To delete an annotation, select it and activate the menu item "edit/delete line".
If all annotations are to be deleted, activate the menu item "edit/delete all entries".

⑧ ▶ To save the redlining, click on the corresponding icon or activate the menu item "Redlining/save entries".

In addition, the following applies:

- Redlining (edit and view) is only possible in large image view, i.e. existing redlining is not displayed in the small image/preview.
- There are only single-line entries. The **Enter** key automatically creates a new entry in the next line.
- An individual entry can be moved with the right mouse button.
- One font and one color can be selected per entry.
- The font size is an absolute point size relating to the original document as it appears in the printout.
- Each user can only edit or delete his/her own entries.
- The redlining can also be shown or hidden when printing using "view/display redlining".

13.2.2.3 Delete documents

➔ Find the records where documents are to be deleted. Activate the "delete" command on the select list and then the "delete documents" option.

In addition, individual pages can also be deleted for documents with internal view:

➔ Call the document with "document/display" and activate the large image view.

➔ The current page will be deleted with the command "document/ large image/ delete".

13.2.2.4 Rearchive documents subsequently

A document can also be attached subsequently in records, which so far had no document.

➔ Call the record, where a document is to be added.

➔ Any further action is corresponding to the process described in chapter 11.3 ARCHIVE DOCUMENTS.

13.2.2.5 Extend existing documents (for view app internal)

➔ Check the document source using "Settings/Doc.Source" on the main menu. You can
- attach an existing image file with the "file" option
- scan a new image and attach with the option "OCR scanner"
- create a new file in a (NCI) program and attach with the option "third-party application".

Confirm the selection with "OK".

➔ Afterwards check the settings in "Settings/Doc.Association".
- Any program from the NCI column can be selected as source-app.
- Image file/internal is automatically taken as view-app for attaching.

➔ If you have not done so yet: Call the record where the document is to be extended.

➔ Activate the command "document/attach image ". Subject to the Doc.Source activated, a file can be selected or created or a template can be scanned.
Further editing options for the new document page are the same as for the new entry.

➔ If you want to attach another image, activate the "attach image" command (i.e. you do not have to hold).

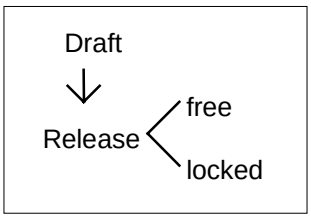
Finally you apply the change with "record/save".

13.2.2.6 Manage document versions (draft and releases)

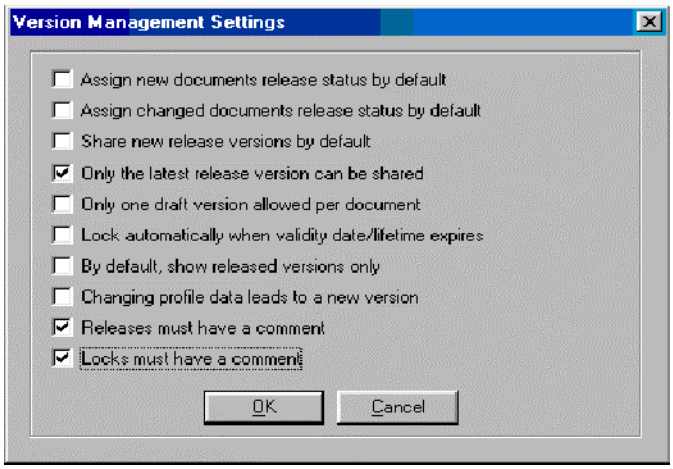
The Dr.DOC® version management enables the administration of different document versions. The prerequisite is that the version management is set up when creating the archive.

MORE INFORMATION ON THIS TOPIC IS INCLUDED IN CHAPTER:
- 15 VERSION MANAGEMENT

A document can have various statuses:



A draft version can be transformed into a release version, but not vice versa (i.e., a release cannot be reset to draft status).
The basic configuration is done via the menu item "Settings/version management":


Version Management Settings
Assign new documents release status by default
Assign changed documents release status by default
Share new release versions by default
Only the latest release version can be shared
Only one draft version allowed per document
Lock automatically when validity date/lifetime expires
By default, show released versions only
Changing profile data leads to a new version
Releases must have a comment
Locks must have a comment
OK
Cancel

In addition, please note:

- Only one free release is permitted per document. If a release is changed, it always leads to a new version (i.e.: a new record).
- For the option "Assign new documents release status by default": If the option is deactivated, it means: new documents have "draft status". If a draft is changed, it does not lead to a new version (one record is maintained!).

Example

A letter automatically archived after data transfer is only a draft and is not sent until after it has been revised. With draft status this document can subsequently be edited and corrected until the ready-to-send version is achieved and can be archived as locked release. If the document had release status from the start, a new record with the respective version would be created with each change.

The fields required for version management are created when the archive is created in the mask. You find more detailled information in the corresponding chapter 14 SET UP ARCHIVE.

More detailled information on locking and releasing is included in the supervisor part in chapter 17 ACCESS RIGHTS AND CHECK.

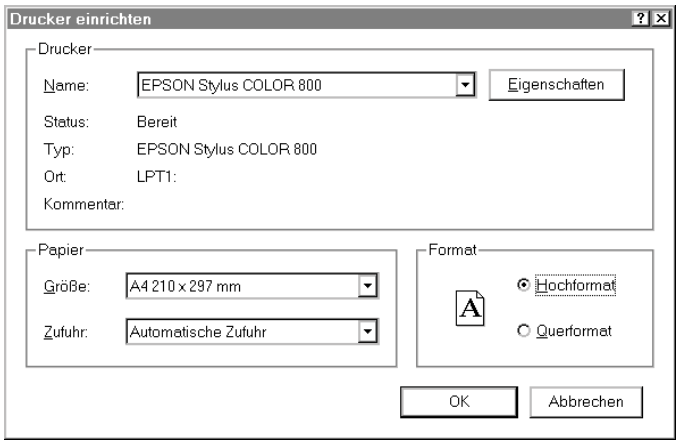
13.3 Print

At first the data is found, then the required print action is selected and the various options are determined.

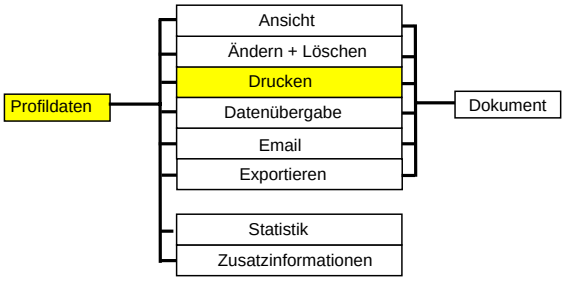
13.3.1 Set up printer

The current printer is displayed in "Settings/print setup". Here you can

- select a printer
- select various print options (portrait/landscape, paper format/feed)
- define various printer settings (via "Settings")(different subject to printer and driver).



13.3.2 Print profile data



Profile data can be printed

- as print tables and
- as print tabs.

A printout with data transfer to a third-party application is also possible. This is described in the following chapter.

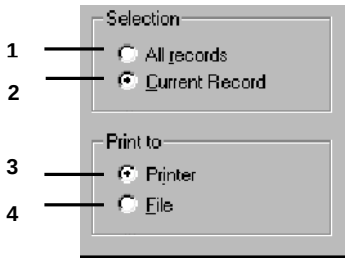
Step by Step

① ▶ Find:

➔ Find the required data.

② ▶ Determine options:

➔ When you obtain a select list, you can make another selection in it by identifying your choice. Then activate the command "print".
If an individual record is called for editing, activate the "record/print" command.
In any case, you will receive the same print query where you can choose between print tables and print tabs. For both printout formats the other queries of the print dialogue are identical:



Select

1: "All records" for the printout of all selected records.

2: "current records" or "selected records" for the printout of the record selected on the list or displayed on the screen.

3: "printer" for direct output to the connected printer (uses the printer, which is identified in Windows as current printer. Make changes to the printer settings via Windows.).

4: "File" for output to a file, which can then be edited further, e.g. via a wordprocessing system. Enter drive, directory and name of the required file in the following query.

③a. ▶ Print tables:

Print tables enables a printout in columns with freely selected fields, e.g.:

```
DATA DIRECTORY Dr.DOC      Customer management
Status: 10/12/1996
===================================
Selection: A*<->H*
===================================

Name                    Turnover       Customer
since
-------------------------------------------------------------------------------
Auer                   35641.00        01/05/1986
Berger                  4561.00        05/06/1985
Elliot                 16548.00        23/10/1990
Huber                  15674.00        04/08/1984
END
```

➔ Determine fields for print tables:

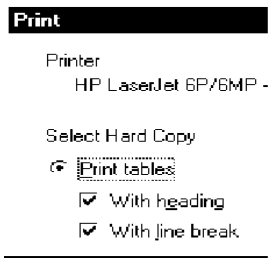
The fields to appear on a printout of the profile data in columns are defined under "Settings/field selection for print tables" on the main menu.

Enter the order of the fields to be printed and after a blank the number of characters to be printed in the field selection in the fields concerned.
Ensure that the number of characters is restricted to 253, where Dr.DOC® automatically adds a character for each selected field to contrast the columns from eachother. Confirm the entry with "OK".

YOU FIND AN EXAMPLE IN CHAPTER:

- 18.2.5 SELECTION FOR PRINT TABLES

➔ Determine the options specially for the print tables in the print query:



Select the "print tables" option.
Select "print tables with heading"as additional option if required (as in the above example). It takes the heading, which is entered in the menu item "Settings/field selection for table heading".
Select "print tables with line break" as an additional option, if the chosen column width is narrower than the text length and an automatic line break within the column is required.

➔ If not done so yet: Determine the other options in the print query as described above.

➔ Start printing with "OK".

Tip

Printer does not print?
Check whether there is an entry in the field selection for print tables! If this field selection is blank, Dr.DOC® cannot print.

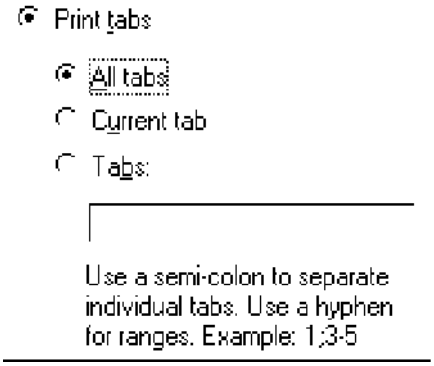
③b. ▶ Print field contents

The contents of the field where the cursor is positioned will be printed. Via ”record/print” (or the printer icon) the field contents are printed as they are saved in the record, that means, for the new entry the record saved last. ”Edit/print field contents” (or right mouse button) prints what is currently in the field.

③c. ▶ Print tabs:

Print tabs is for printing out the input mask with the profile data, as it appears on screen.

Call the "print" or "record/print"command in the record or on the select list after a search.



➔ Select the "print tabs" option.

➔ Select whether all tabs, only the current or certain tabs are printed. If selected tabs are to be printed, enter the tabs page numbers: single pages by semicola and ranges with hyphen.

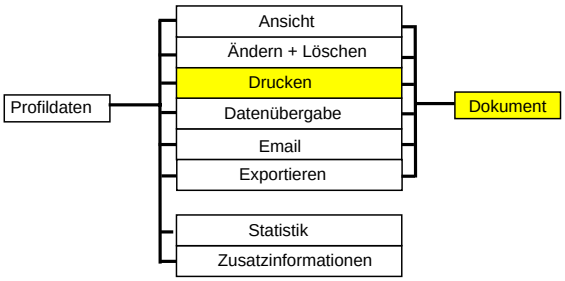
Example If you want print the first, fourth, fifth, sixth and eigth page, enter the following: 1;4-6;8

➔ If not done so yet: Determine the other options in the print query as described above.

➔ Start printing with "OK".

Note The printout of the profile data via the data transfer to another application program is described separately in the following chapter 13.4, as it concerns profile data as well as documents.

13.3.3 Print documents



Documents can be printed out subject to connection

- via the internal connection and
- via a third-party application.

In addition, it is also possible to print out documents with the data transfer to a third-party application, as described in the following chapter.

① ▶ Find and call document:

➔ At first, find the required records. Then call a record for viewing, as the document cannot be printed from a select list.
Call the document as large image with "document/display". As an option you can print out a stamp on scanned images. The stamp may include the following details:
Executing user, print date, time, document ID and version number of the version management.

②a. ▶ Printout internal:

➔ Activate the command "document/large image/print".
The current printer will be shown. You can change the printer selection and setup with "Settings/print setup" if required.

Select what you want to print: the current image, all images (pages) or selected pages. For the last selection, enter the required page numbers separated by semicolons.

➔ Any existing redlining entries can also be printed, if "view/display redlining" is activated.

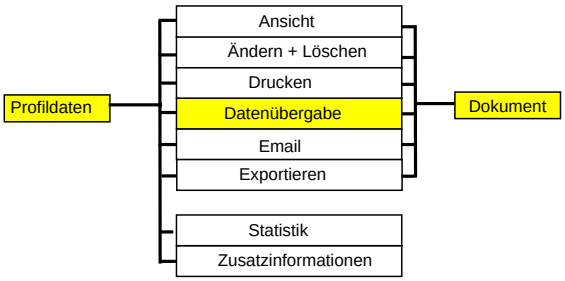
➔ Start printing with "OK".

②b. ▶ Printout via third-party application:

This concerns all documents, which are archived with another view-app than "image file/internal". For these documents the respective third-party application is started for document view.

The options of this program will then be available for printing.

13.4 Transfer data



Transferring data means importing data (profile data and/or document) from Dr.DOC® to a form or a template of a another program.

Tip

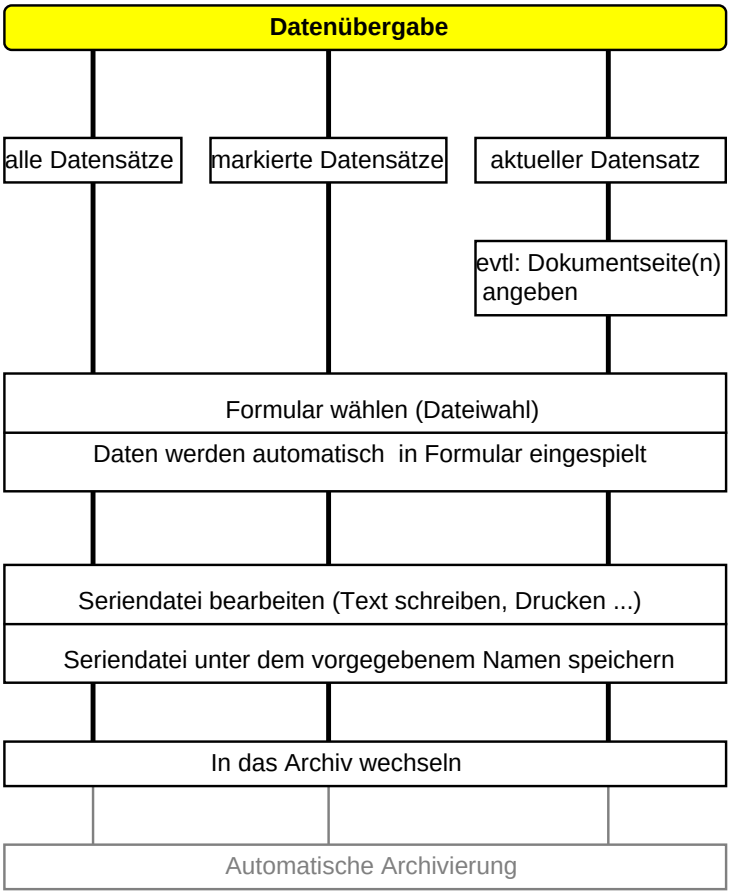
Print with own layout

Use the transfer data function if you require, e.g. a printout of profile data and/or documents designed with frame, various fonts etc.

Some preparation work is required for using the transfer data function: You must state the fields from which profile data is to be applied in the archive and the third-party application, to which the data is transferred, must have a template for importing the data.
This basic work, which the system administrator usually only has to carry out once, is described in detail in part 4, chapter 18.3 PREPARE DATA TRANSFER TO THIRD-PARTY APPLICATION.

Data can be transferred to all programs with a macro language, e.g. word processing applications. Dr.DOC® includes a macro for Winword as standard. Various examples refer to this association.

Brief information



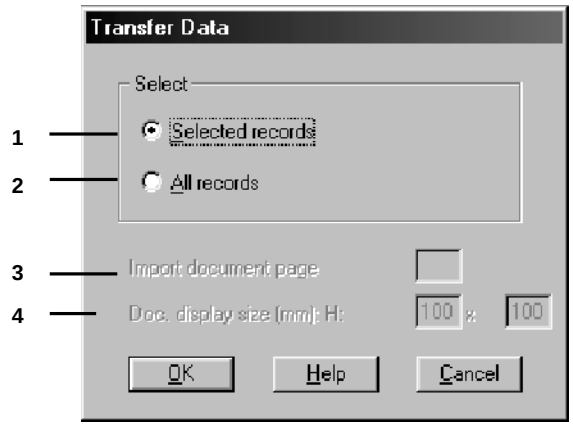
Step by Step

① ▶ Find:

➔ Find the required data.

② ▶ Determine options:

➔ When you obtain a select list, you can make another selection in it by identifying your choice. Then activate the command "transfer data" or click on the icon on the toolbar.
If an individual record is called for editing, activate the "record/transfer data"command.



1: Select "current records" or "selected records" (appears, if you have selected several records for transfer in the select list). for importing fixed data of a single record to a template (e.g. transfer carrier or single letter). Dr.DOC® imports the profile data determined by you into the form, which you can then expand and edit with any entries.
2: Select "all records" for importing all records of the select list into a series file.
3: Importing one page from the document belonging to the record is only possible for image documents, which are archived with the "document"-app internally. For the data transfer of document pages, please ensure that
- enough memory is available

- the template must include a corresponding annotation stating the position where the document is to be inserted. Refer to the note in chapter 18.3 PREPARE DATA TRANSFER TO THIRD-PARTY APPLICATION in part 4.

4: When a document is transferred, please also state the size of the space intended in the template, so that the image receives the optimum fit.

➔ Confirm your selection with "OK".

③ ▶ Select form:

➔ Now select the name of the template file. "OK" starts the import of data into the third-party application.

Note The query "transform file from" may appear in connection with the wordprocessing system WINWORD. The "MS-DOS Text" option must be selected here.

You have now the option to edit (e.g. insert individual letter text), print and of course also save the text using your word processing system. Your texts are initially filed in WINWORD as "archive.doc".

④ ▶ Optional: automatic archiving after data transfer:

The archiving of the file with the imported data can be automated. If the archive is set up accordingly, another archive is automatically called after the data transfer is completed.

➔ To enable automatic archiving, the file must be saved with the imported data under the preset name archive.*erw* (*.erw* = e.g. .doc for Winword) in the predetermined directory. It is easiest, if you close this file after completing your work (in Winword via "file/close") and if you answer the query whether to save with "Yes".

➔ The third-party application itself does not have to be terminated. Return directly to Dr.DOC® with **ALT**+**TAB**.

➔ Exit the data transfer dialogue in the archive with "cancel". The archive is now automatically called for data transfer.
If required, enter profile data here. Activate the "save" command for archiving.

➔ The archive for data transfer is terminated automatically. You are now back in the original archive.

Note

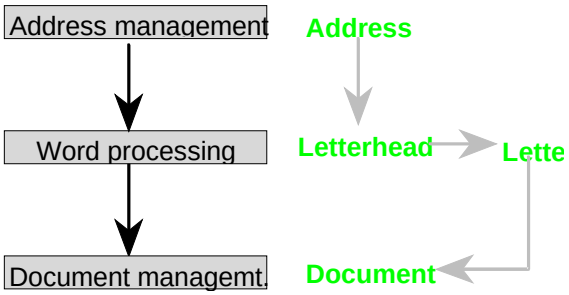
From Winword 95 and later, a document created with data transfer is archived via “Dr.DOC archiving” on the menu line of Winword.

INFORMATION ON THE SUBJECT OF AUTOMATIC ARCHIVING IS INCLUDED IN CHAPTER:

- 14. SET UP ARCHIVE

Example

Create letter and archive in document management



A (standard) letter is to be written to companies XYZ and ABC and is to be archived immediately.

- The workflow begins in address management: You are looking with text retrieval for e.g. XYZ.
- Activate the "transfer data" command on the select list with the record found.
- Select the letter template in the word processing application as form, which is called e.g. inquiry.doc.
- The two addresses are now automatically imported. You can supplement the text of the letter if required. Then you can print the letter to be sent.
- Now close and save the file and return to the archive. The document management is now started automatically.

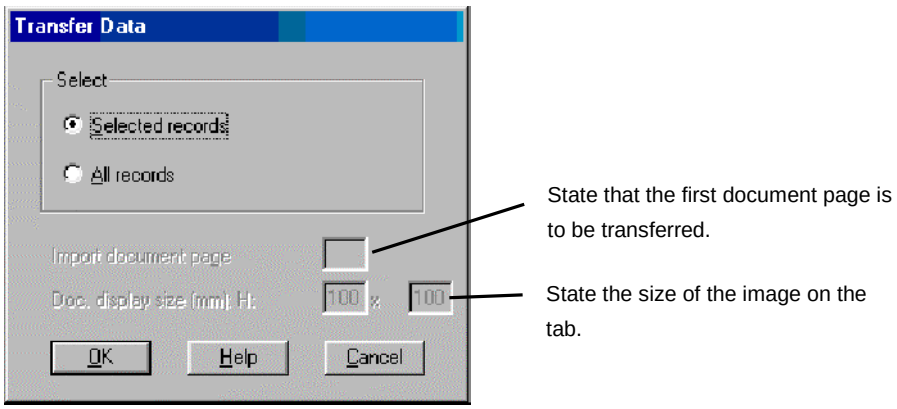
- Enter some profile data in document management (e.g. the subject of the letter, a resubmission date or similar). You do not have to enter a "keyword list" with the letter contents, as you will be able to browse for the archived letter directly with text retrieval.
  You archive the new document.
  The document management is automatically terminated and you will be back in address management.

Example

Create tab from inventory

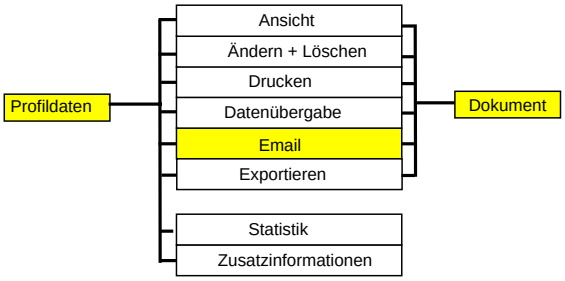
A tab with the essential data and an image of the object e.g. as "packing slip" is to be created for the loan transactions from an inventory.

- Find the object in the inventory, e.g. with the inventory number.
- Call "transfer data" in the record. Determine:



- Select the tab template in word processing as form.
- The data is now automatically imported into the template.

13.5 Forward data to e-mail program



Profile data, documents or links to them can be forwarded to an e-mail program and sent.

Note

Requests to E-mail program

The program must be MAPI capable.

Step by Step

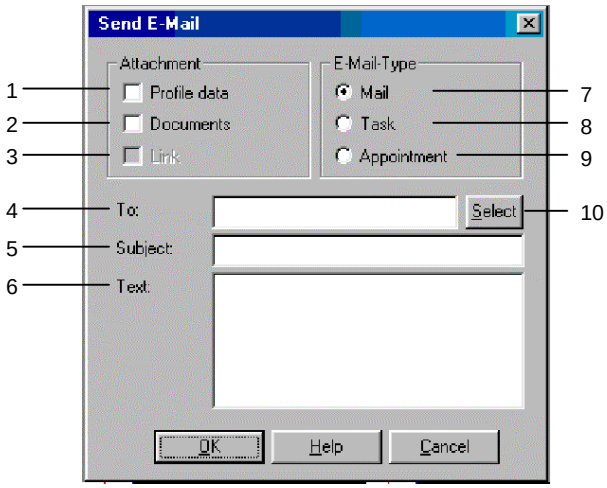
① ▶ Find:

➔ Find the required data.

② ▶ Determine options:

➔ Go to “Settings/field selection for/ASCII export” on the menu bar and determine the fields, whose content is to be transferred to the e-mail.

➔ When you receive a select list, you can make another selection. Then activate the “record/e-mail" command or click on the icon on the toolbar.

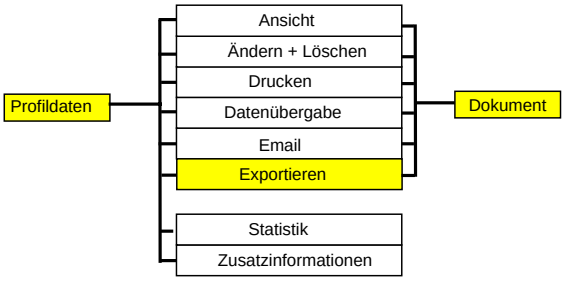


1: The profile data of the selected records is sent
2: The documents linked to the selected records are sent.
3: Links to the selected records are sent (for several records, ONE link is created and sent for each individual record).
The prerequisite is that the recipient:
- works with **Dr.Doc**® from version 6.0
- has access to the same archive server
- is logged on to the same user set

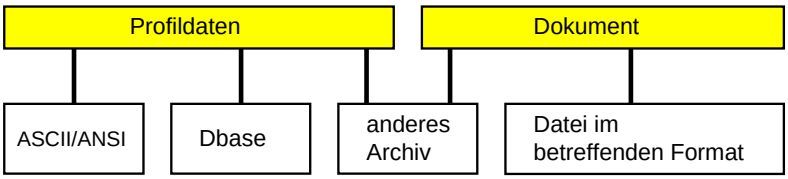
4: The mail address of the recipient is entered here
5: Subject line
6: Editable text field
7: Select for normal mail
8+9: A task/appointment can be sent here. The prerequisite is that sender and recipient work with Outlook. If the recipient does not work with Outlook, s/he will receive a normal mail.
10: A user of the current user set can be selected here as recipient.
The transfer of data starts with "OK".

The data is filed in the local work directory in a subfolder “Email” as *.dat (profile data), *.tif (document) or *.arx (link).

13.6 Export data



You have the following options for exporting data:



The following only describes the export of documents as file. The export of profile data without or with document is described in detail in the system administrator part in chapter 21.3.

13.6.1 Exporting documents as file

Step by Step

Archived documents can be exported into a file at any time. The archived documents remain unaffected.

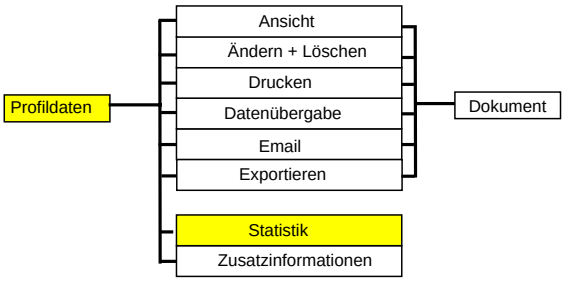
➔ Call the record containing the document to be exported.

➔ There are two possibilities for exporting documents archived with internal view:

- Export document by page (i.e.: one page = one file).
  Call the document with "document/display" and go to the page to be exported; activate the "document/export large image"command, check the directory where the file is to be created and enter the file name. Start the export with "OK".
- Export document in multipage TIF file (all pages = one file)
  Call the document with “document/display”; activate the “document/export” command; check the directory where the file is to be created and enter the file name. Start the export with "OK".

➔ For documents, which are associated with a third-party application for viewing:
Activate the "document/export"command. Check the directory where the file is to be placed and enter the file name. Start the export with "OK".

13.7 Statistics



The "Statistics" command offers you the option to quickly carry out statistical calculations in records with certain entries selected by you. The calculation determined under "Settings/formulas for statistics" will be carried out.
These evaluations should not be mistaken with the calculation definitions!

Step by Step

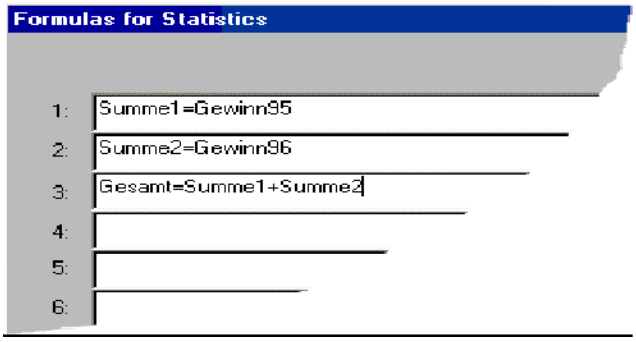
① ▶ Determine formulas:

Enter the formulas in the form in "Settings/formulas for statistics" according to the plan (e.g.) Sum=*a*+*b*
Instead of the parameter *a* and *b* enter the field name of the field from which the calculation is to be executed.

The following are valid as operation characters **=** , **+** , **-** , ***/*** , *******
The following are not valid **:** and **x**

Ensure that there are no blanks within the formulas.

Example

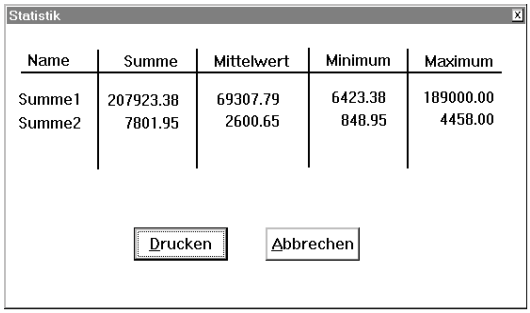


At first all entries in the "Profit95" field in the selected records are added as sum1, then all entries in the "Profit96" field. Sum1 "Profit95" is added to sum2 "Profit96" as "Total".

② ▶ Carry out calculations:

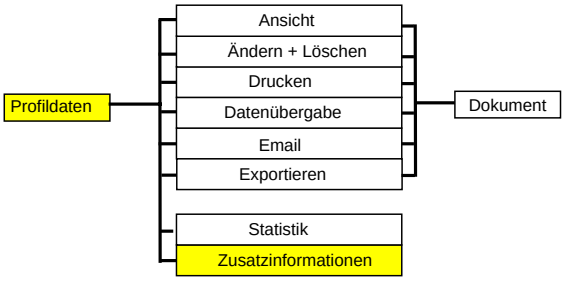
➔ At first find the records, which are to be used for carrying out calculations. You receive a select list, in which the command ”Statistics” can be activated and which is used for carrying out the calculation. The calculation is always carry out in the entire select list, i.e. is not subject to selections.

➔ A table appears as result, e.g.:



➔ The displayed list can also be printed using "print".

13.8 Call additional information



You have the option to call additional information on a certain record from another archive.

Chapter 20 LINK ARCHIVES RELATIONALLY describes how to create the basis for this relational link of archives.

Call a record. Click with the mouse on the "i" button in the right corner of the field:

Or: Move the cursor into the field, for which the link is stated. Select the "edit/call additional info "command.
The linked archive is called with the required data.

Note

If additional information is called up in a table column, the information on the entry in the table line where the cursor is positioned will be searched.

If a corresponding record does not yet exist in the linked archive, you now have the option to create it. The entry of the original archive is automatically applied in the association field.

Example

A project management includes a field with officer name as well as a field for affected regulations and acts. Various links are set up for these fields:

Officer Name → Address management
Act abbrev. → Act management

these links can be used as follows:

Mr Brown, the officer, must be called. But the telephone number is only in the address management. The cursor is placed in the officer field and the address management with the address entry concerned is called with the "additional info" command.

If you now also have to write a letter to Mr Brown, the data transfer to word processing ("record/transfer data") can be started in address management. When the process is completed, the project management is active again.

Or: More detailled information on the act abbreviated WHG is required. The cursor is placed in the act field and the "additional info" is started. Now the act management with the corresponding record is called.

PART 4

System Administration and Management

This part includes information
for the system administrator

PRELIMINARY REMARK

We recommend you determine a system administrator for **Dr.Doc**® who deals with the setup and the basic management of archives. This recommendation applies to the single user version, if several users work at one workstation and in particular for standard net and client/server net use.

This 4th part contains information about functions for the system administrator and supervisor, which are not required in daily work with **Dr.Doc**®.

You will find out how to

- · set up and manage an archive
- · register users
- · set up and manage a user set
- · create a Thesaurus
- · link archives relationally (additional info)
- · set up and maintain application-specific help
- · import and export data
- · secure the data stock

PRINCIPAL NOTES FOR THE CLIENT/SERVER SYSTEM ADMINISTRATOR

If you work with a client/server system, please observe the respective notes, if C/S workflows are somewhat different and the additional special tips!

- It is necessary to additionally run the server program docserv.exe at the archive server in C/S mode. This program creates the communication to the individual clients (independent of the net work protocol).

- On pausing or exiting the server program, all tasks of clients being processed at this time are stopped (not cancelled). On restarting or stopping the pause of the server program, the process will be continued.

- Some settings and functions can only be defined or executed at the archive server (see the corresponding notes).

- If the system administrator makes changes in an archive at the server, nobody should be working at a client with this archive!

- For some settings you will be reminded when saving that the client parameters still have to be called. This is necessary to ensure that the changes will be available at the clients. In this case only call "Management/edit archive parameter ..." and then the "Edit client parameter " command. Do not make any changes here, but just confirm with "OK".

SET UP AND MANAGE ARCHIVE

Considerations

Before you set up a new archive, you should consider the following questions and make brief notes on paper. These considerations help to deal quickly with the actual work.

➔ Collect:
What data shall be archived? Are the documents to be archived images, files...?

➔ Views:
Shall all data be filed in an archive or is it more sensible/clearer to file certain entries in their own archive, which is linked relationally? Example: The artists' biographies in a picture collection are filed separately in their own archive and not with each picture. Or: The entire recipients' address data of an invoice output archive is not saved with each invoice, but uniquely in an address archive.

➔ Sorting:
Determine the order of the data fields. Decide which fields are combined on a tab by subject and which fields are for example defined as continuous text or as table.

If necessary, plan further fields for

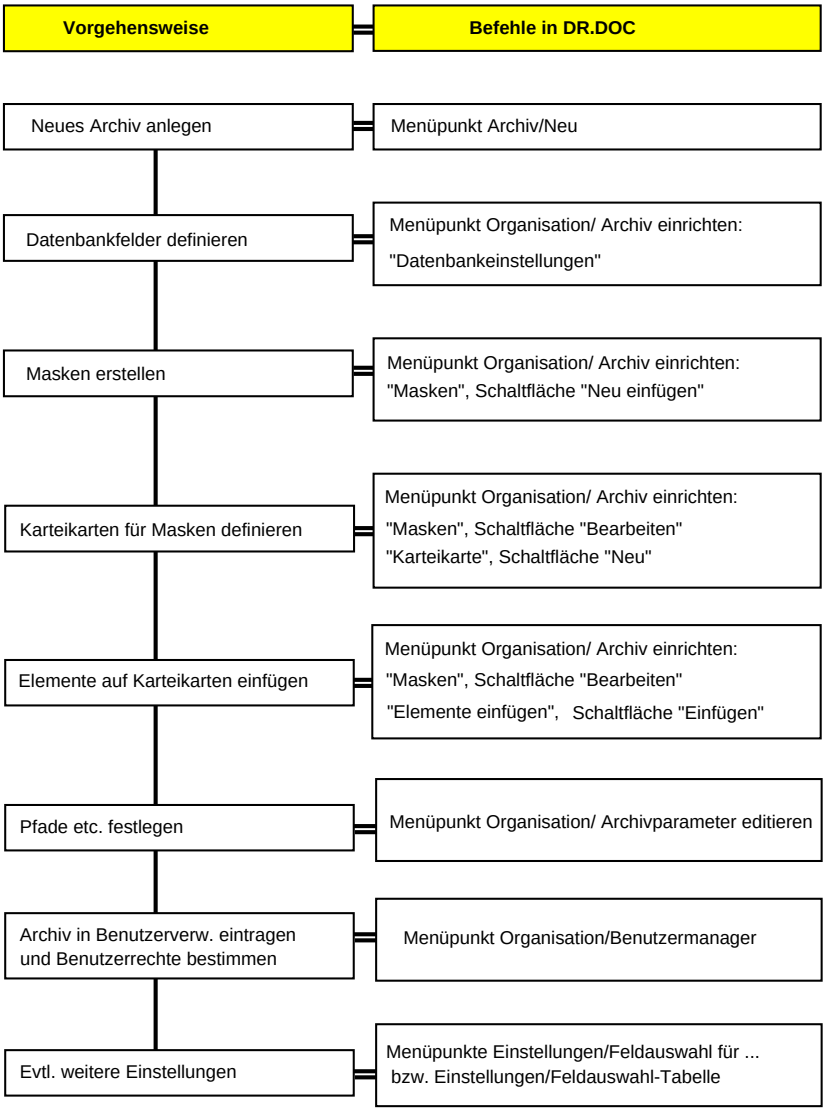
- User registration: fields for "created on", "created by", (tables?) fields for "modified on", "modified by"
- Definition of the access right to a record with document (one field)
- Number generator (one field)
- File name, if the original file name is to be entered automatically when archiving files (one field)
- Due date calculation: one field for output date, one field for the due date and one field for result date
- OCR edited text (especially when using the OCR module; one continuous field)

- Check box: This field only offers the options "on" (selected) or "off" (not selected) for data entry.

➔ More questions:
Should one (or several) Thesaurus be created (e.g. as (hierarchical) Thesaurus, for checking the consistency of an entry etc.)? What is the best field to link the Thesaurus to?

14. SET UP ARCHIVE

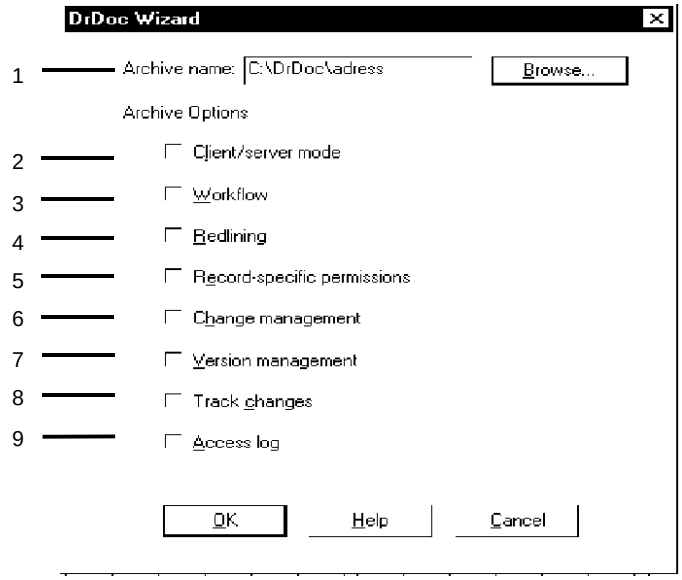
Brief information: Procedure for setting up new archives



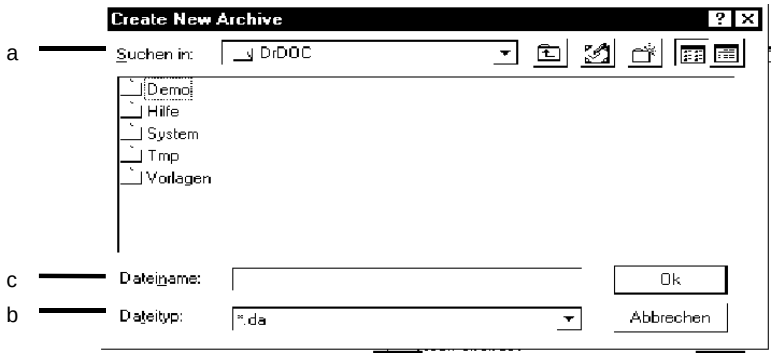
14.1 Create new archive

Call "archive/new" to create a new archive.

The Dr.Doc* assistant already offers basic settings:



1: Enter the directory and the name for the new archive here. You can also click on the "browse"command to display the file selection dialogue:



a: Shows the current directory. If you do not want to create the new archive in this directory, select your required directory.
b: The file type shown here must not be changed.
c: Enter the name for the new archive here.

2-9: Select the required settings:

2: Client/Server Mode:
Select for client/server archives.
Do not forget that C/S applications can only be set up at the archive server to obtain correct path details.
If archive and network server are separate, the archive must first be created on the network server in the subdirectory COMM\SERVER (drive name from the client's view).
For C/S archives, several subdirectories are set up on the path stated.
C/S applications are then called at the archive server from the subdirectory \comm\server on the path stated
at the client: Only archives, which were assigned in the active user set can be selected here (via "archive/select")!
If a user set is not yet active, it is possible to log on via "archive/user set/additional login".

C/S

BASIC INFORMATION ABOUT SEPARATING ARCHIVE AND NETWORK SERVER:
- 2. INSTALLATION: CLIENT/SERVER

↳

3: Workflow:
Select if you want to use the workflow manager.

4: Redlining:
Every user can add annotations as redlining to NCI-documents, which are archived with the view-app internally. This redlining can be shown or hidden when viewing and when printing and is fully searchable.
If you select the "Redlining" option here, a field with the same name is created (which is only required internally and cannot be inserted in the mask).

Note

The redlining function can also be included into an existing archive later on via "management/set up archive" by creating a new single-line field named "Redlining".

MORE INFORMATION ON THIS SUBJECT IS INCLUDED IN CHAPTER:
- 14.7 EDIT ARCHIVE PARAMETER

5: Record-specific permissions:
This option later allows records and/or documents to be allocated to certain owners and permissions, which may vary from record to record.

6: Change management:
:Modified by, date and time can be logged as soon as the record is saved. The required fields "modified by", "modified on" and "modified at" are created automatically when the option is selected.

Note The relevant fields can also be created manually later on.

7: Version management:
Documents may be filed in different versions (draft = can be changed and release = cannot be changed, but can be copied). Documents archived as release can in addition also be (optionally in connection with a delay) locked or released. When this option is selected, approx. 20 database fields are automatically generated.

FURTHER INFORMATION:
- 15 VERSION MANAGEMENT

8: Track changes:
To log changes of the profile data (i.e. text before/after), track changes must be created. This file is created when the option is selected.

Note

The track changes can also be set up later in an existing archive via "management/edit archive parameter ".

9: Access log:
Select this option if you want to record log-ins with incorrect password with an access log.

Note

The access log can also be set up later in an existing archive via "management/edit archive parameter".

When all options have been set up, you can create the new archive with "OK".

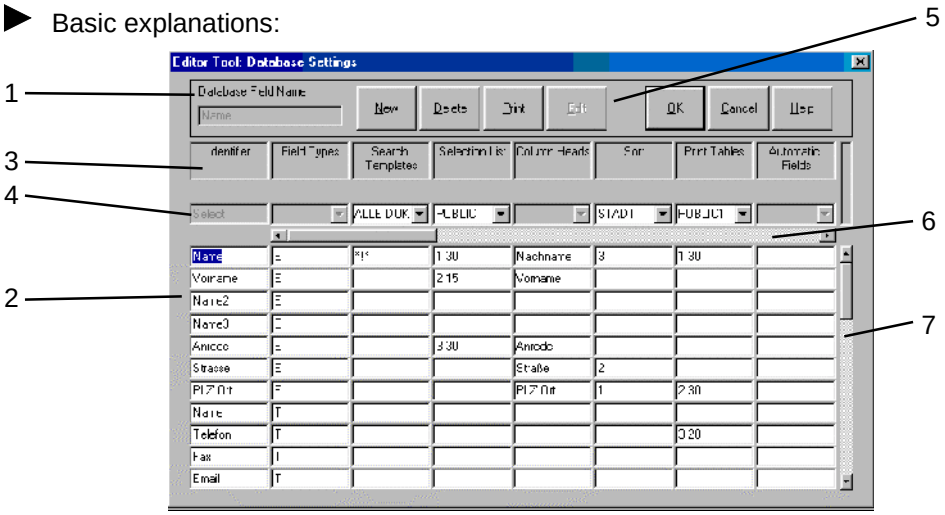
Afterwards the "Editor-Tool" window is automatically displayed. To define database fields, click on the "database settings" register and continue as described in the next chapter.

14.2 Define database fields

The "database settings" window allows you to create new database fields or to change or delete existing fields, as well as define a variety of settings.

Call "management/set up archive" and select "database settings" tab :

▶ Basic explanations:



1+2: Context field or field name and field identifier

The database field name (1) is the internal name for the field, which cannot be changed after it has been defined. The identification for the field (2), as it then appears on screen, may be different to this database field name!
The field names (1) are required for some settings (e.g. Thesaurus). Therefore a field name can only be issued once. The field identifiers (2) may be used more than once.

The context field (1) contains, if the field identifiers are not being edited, the name of the currently selected setting (4), e.g. the name of the current search template, sorting etc.

The "image" field (name and identifier) is already in every archive by default. Please do not delete this field here and do not rename it! (Note: not all fields have to be displayed; It does not matter if the "image" field exists for an archive without image documents.)
The fields "ContentType" and "Extension", which are required for the document association of Dr.Doc* internally, already exist, too. These fields cannot be inserted in a mask.

Note The above illustration already includes the fields, which can be automatically created with the **Dr.Doc**® assistant when an archive is created (redlining, document locked, modified by/on/at).

3: Column headers
are the headings of the individual setting options. Click on the relevant name to activate the column and make changes in it.

4: Configuration names
It is possible to save different configurations for some settings. These are then available on a drop-down list in (4).

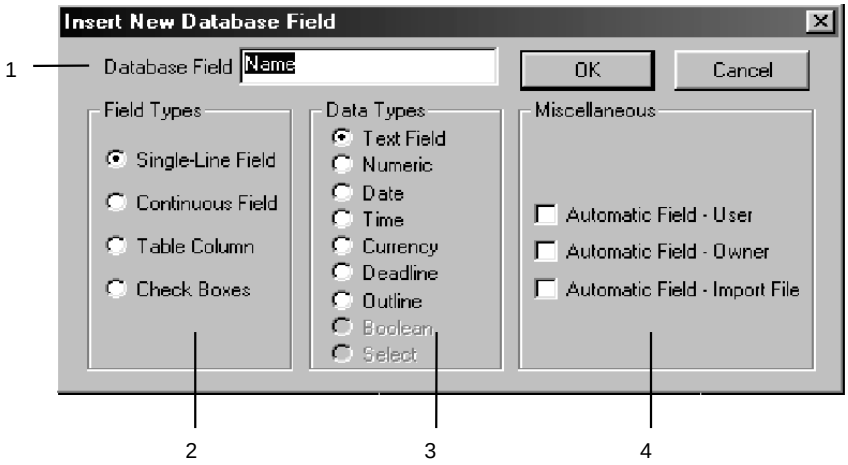
5: Command

"New"	subject to the column selected (see (3)), a new database field or a new configuration is created.
"Delete"	subject to the column selected, a database field or a configuration is deleted.
"Print"	prints the entire database settings.
"Edit"	offers the option to make entries directly in the mask for the selected column (corresponds to "Settings/ field selection for.."). The command is not available for all columns. If no mask is active or a mask is not available yet, "Edit" is not possible.
"OK"	saves all database settings and closes the window.
"Cancel"	closes the window without saving the settings or changes.
"Help"	offers online help with regards to the subject.

6+7: Scroll bars
With the horizontal scroll bar (6) you can display more columns. (7) allows you to scroll vertically, if there are more fields than can be viewed in the window.

▶ Procedure:

- Create new fields:
  Place cursor in the field identifier and call the "New" command.



1: Issue field names (corresponds to (1) above!)
2: Select field type (explanations of the individual field types, see chapter 8.3.2 SCREEN SETUP/USER INTERFACE and chapter 14.6.1 to 14.6.6!)
3: Select data type depending on field type.

Important Field types cannot be changed subsequently, data types and "other identifiers" can be changed!

4: Select other identification (only possible for single-line and table fields). Subject to data type, various selections are available:

Data type	Possible other	Explanation

	identifiers	
Text field	automatic field - user	when saving, automatic entry of the current user
	automatic field - owner	when active record-specific access right, automatic entry of the current owner
	automatic field - import file	for file archiving: when saving, automatic entry of the original file name for the file archived in this record
Numeric	Range	numeric range; values within this range can be searched
	Number generator	automatic counting of records
Date	Range	Date range; Dates within this range can be searched
	Automatic field	when saving, automatic entry of the current date
Time	Automatic field	when saving, automatic entry of the current time
Currency	Range	Currency range; values within this range can be searched
Outline	Format	enter the format of the outline per data type abbreviation (required for correct sorting)
Selection	Number of radio buttons	only for field type "button": several option buttons can be created; only one of the stated buttons can be activated at one time. The names of the individual buttons are stated, separated by commas, under "Database field" (e.g.: free,locked)

DETAILED INFORMATION AND EXAMPLES OF TYPES AND IDENTIFICATIONS:

- 18 SETTINGS

➔ Leave the definition with "OK" and call the "New" command again for the next new field.

Define settings for the fields:

➔ Enter field identifier (corresponds to (2) above), if it is not be identical to the field name.

➔ Define the basic settings for each column as far as already known. These settings can be supplemented or changed at any time. (see chapters 18.1. and 18.2)

Note

A new archive always already contains the database field "image". With this field, archived image documents can be shown as so-called "small image" on a tab for preview purposes. Please do not delete or rename this field!

Tip

Issue unique field names:

A field name can only be issued once because if you want to use the new archive together with other archives (e.g. as Thesaurus or for Thesaurus adoption, for additional info etc.), many definitions are only determined via the field names and unique allocations would otherwise not be possible. Field identifiers however can have the same names: e.g. you create the field names "created on" and "modified on", but you select "date"as identifier for both of them.

Note

By creating a new database field, the field identifiers and the field definitions for data types and automatic fields are automatically entered in the corresponding columns of the "database settings" table:

If you subsequently want to change these definitions, enter them into the table. (see chapter 1 DETERMINE/CHANGE ENTRY CRITERIA)

14.2.1 Database settings

The "database settings" window not only allows you to define database fields, but you can also determine basic settings, e.g. search templates, select lists, sortings, data types, import and export definitions. You can also determine or change these settings at any time later on.

Tip

When you create a new archive, we recommend you initially only determine the basic definitions (e.g. mandatory field) and create the mask(s) immediately. The other settings and definitions can then be determined afterwards either in the table or in the mask (via "Edit" or via "Settings/ field selection for...") .

The following table provides a brief overview of the various settings options. Detailed information and examples of the individual settings are in chapter 18.

Search templates	Search templates will be used if "database/search fields with template" is called. Certain search criteria can be saved as search templates. They help to quickly and conveniently call search queries, which are required again and again.
Select list	A select(ion) list is the hit list, which is displayed after a search query. It allows you to define the fields and the number of characters per field to be shown in the select list. (Number fields to be listed consecutively and enter the number of characters after a blank)
Headings	Allows you to enter any heading for the fields shown in the select list.
Sort	Sorting criteria for organising the records found on the select list. First enter the sorting order and after a blank the number of characters to be checked when sorting. If for example you want to sort according to name, then first name and afterwards town, enter the following numbers at the corresponding fields: Name 1 10 First name 2 10 Town 3 10
Print tables	Number the fields to be printed and enter the number of characters for the table width after a blank.
Maintain field entries	This command is only available if the check box for "delete form after entering new record" is activated under "management/edit archive parameter...". All fields of the input mask are then cleared in new entry mode for the next record when saving a new record.

	But it is also possible to determine individual fields where the entry is to be maintained for the next record with the "Maintain field entry" function. Enter any character in the fields concerned.
Output duplication check	The program can carry out an output duplication check for global and field searches to stop the output of duplications (= records, where the field entries in the fields stated here are the same) on the select list. The prerequisite is that the required fields have previously been numbered under "output duplication check".
Transfer data	"transfer data" (TD) applies to importing data into a form (e.g. standard letter document) of a third-party application. Number the fields to be transferred consecutively. Determine the selection of the fields for all forms (letter, transfer etc.) together. However, ensure that you keep to the order of your entries in the control file. The first field name of the control file must be entered as the first print field etc.
TD Archiving	It is possible to automatically transfer certain field entries from an archive (e.g. the company name from an address) into the associated archive after using the data transfer interface. For this purpose, the field name of the archive into which the data is to be imported is entered at "Data transfer archiving" into the field from which the data is to be adopted.
ASCII Import	ASCII/ANSI archive files created externally or also other **Dr.Doc**® archives can be imported into the current archive with "Import ASCII/ANSI file". At first consecutively number the fields, into which the data is to be entered at "ASCII/ANSI Import". NOTE: If you want to import a **Dr.Doc**® archive, you only have to make the selection, if the two archives do not have an identical structure. If the same format exists, the fields do not have to be numbered.
ASCII Export	The export of data into another archive or as ASCII file is carried out via the "Export" command within select lists or within an individual record to enable a partial selection. Enter the following (in the archive, from which data is to be exported in ASCII format) under "ASCII Export": • Exporting into another archive: the field names of the destination archive for the export • Exporting into ASCII file: number the fields to be exported consecutively
DBase Import	Data in DBASE format can be adopted with the help of this setting. Number the fields in which the data is to be entered consecutively. Check that the correct data types for the transfer (e.g. date, number field) are entered. To import, call

	"database/import DBASE" and enter the path and name of the DBASE file to be imported.
DBase Export	For exporting data into DBASE format, enter the order, in which the fields are to be adopted. Please observe the following for a correct export: • fields, which are longer than defined in the DBASE file, will not be transferred if importing into an already existing DBASE file • for number fields, the total length and the positions behind the comma must be entered behind the number for the transfer order. That means: Total length of a number is the entire number of characters with decimal point and positions after the comma: 852.56 e.g. has the character number 6. There are 2 positions after the comma in the previous example. If the number field is to be transferred as the third item in the sequence, the entry in this field must be: 3 6 2 . The individual numbers are separated by blanks.
Linking rule	Please follow the detailled instructions for linking rules of hypersearch definitions in chapter 12.5 DEFINE HYPERSEARCH

Data types	Enter: S for string (letters, digits) U for string (letters, digits) for workflow Z for digit NR for numeric range D for date DR for date range C for currency CR for currency range O for outline F for deadline XD for date + time boolean for button (on=activated=1 or off=blank=0)
Automatic fields	Apart from determining basic data types for the database fields, there is also the possibility to have the program make automatic entries in selected fields. The following are available B for user name D for current date T for current time F for file name N for number generator NV for changeable number generator V for adopting an entry from another field.
Mandatory fields	If a field always has to have an entry, this can be defined by entering any character in the fields concerned under "mandatory fields". A record can only be saved, if there is an entry in the mandatory field.

Key fields	The key management (index) facilitates quick access when carrying out a field-orientated search of certain entries in records. Any fields can be determined as key fields by the user. A key can be created and/or changed at any time. Three types of keys can be selected: • Multiple key (MK): A term may be in this key field several times • Duplication key (DK): A term may be in this key field as often as you like. As soon as two records have the same entry in this key field, the program searches further fields preset by the user when making new entries to establish whether identical entries exist here, too. If so, an error message will appear. (also see: Input duplication check) • Single key (SK): This is the strictest preset for key fields: A term may only be in this key field once
Input duplicates check	As soon as two records have the same entry in a key field, the program searches further fields preset by the user when making a new entry to establish whether identical entries exist here, too. If so, an error message will appear. To carry out an input duplication check across determined fields, a key field for duplication keys must be defined. Enter the required fields for the input duplication check consecutively numbered.
Additional info	Additional information on a certain field entry can be called up from another archive. The prerequisite for this is • that a field exists in both archives, which has the same entry in both archives • and that the corresponding definitions were determined in "Settings/additional info definition..." As soon as you click on the "i" button in the connection field in edit mode you will fork to the additional info archive. If a record with identical content in the additional field is found in the additional info archive, it will be shown.
Thesaurus	To facilitate the input of field entries and to guarantee the consistency of these entries, you can apply entries from another archive in the current archive with the "edit/call Thesaurus" command in the new entry or edit mode. The prerequisite for this it • that an archive was created, which is supposed to act as Thesaurus archive • that the corresponding settings were defined in the

	"Settings/Thesaurus definition..." dialogue.
Field types	Enter: E for single-line field M for continuous field (memo field) T for table S for button
max. or min. field length	The number value entered here indicates the minimum or maximum number of characters the field entry may have.

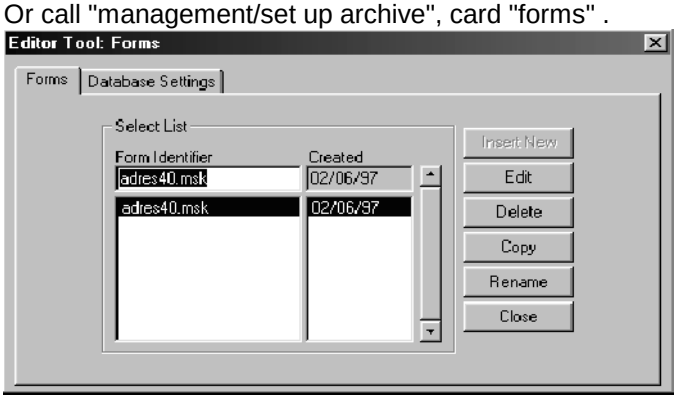
14.3 Create forms

The database fields must be arranged on screen. Several different arrangements are possible and are saved as forms. A mask does not have to include all available database fields - independent of the data a record contains. As access to a mask is subject to the access rights of the respective user, forms are, together with the record access protection through the user set, another means for keeping data, which is not supposed to be generally available, secret.

Tip in the net

If you create forms, which are used at several workstations, you should use the biggest screen resolution that is used in the network. That is the only way to ensure that the complete mask can be seen at all workstations - without having to scroll. If very different resolutions are used, you should also consider whether two different forms might be more appropriate - e.g. one for the resolution 800x640 and one for the resolution 1024x768.

➔ When setting up a new archive, either exit the database settings with "OK". The forms editor is called automatically.
Or call "management/set up archive", card "forms" .



Enter the new form identifier or select an existing name for editing.

For a new mask, click on the "insert new" button now. Then select the "edit" command.

The following other commands are available:

"delete"	deletes the selected mask
"copy"	copies the selected mask (enter new name, confirm with "OK")
"rename"	gives the selected mask a new name (enter new name, confirm with "OK")
"cancel"	stops the edit tool without saving.

In addition, the following are available here and when further editing the commands mask in the command line at the upper end of the screen:

1: Exit editor (and mask) and save settings.

2: Exit mask and save settings; new mask may be created.

3: hold for all tasks with the editor.

4: Exit editor (and mask) without saving.

5: Exit mask without saving.

6+7: Show or hide editor window (useful when positioning the elements)

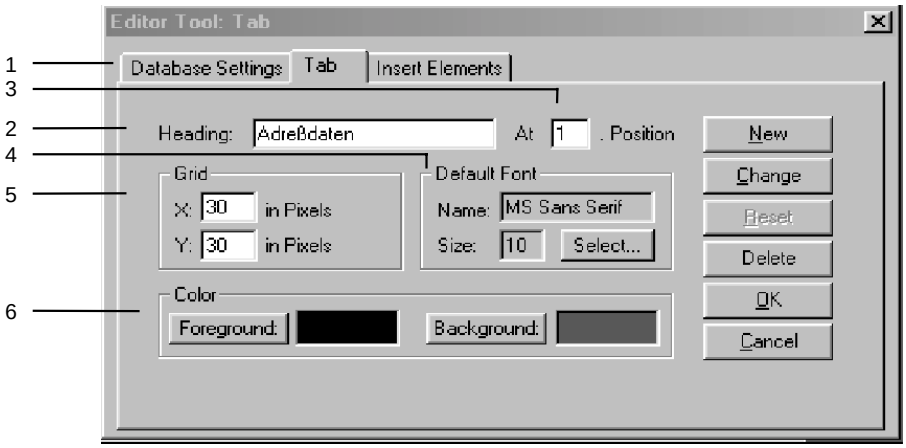
8: Help

The fields can be split onto several tabs in a mask and in addition can be combined visually with frames.

14.4 Create tabs

The fields are arranged in tabs. A tab (default name "Page-1") is always available.

➔ Select a form or create a new one and activate "edit" in "management/setup archive", register "forms".



1: With the various cards, you can change between database settings, create tab and insert elements.

2: Enter the heading for the tab here. If an already existing tab is to be edited, click on the tab name behind the "Edit tool: tab"window to activate this tab.

3: The way the tabs are arranged from left (=Number 1; the top one when calling new) to right is shown here. You can change the preset manually.

4-6: These settings do not only apply for the tab itself, but also as presetting for the elements to be inserted (which can then still be changed individually).

4: Click on "select" and set typeface, typesize and further options.

5: The x/y coordinates determine the spacing of the fields on the tab. The X coordinates represent horizontal spacing and the Y coordinates vertical spacing in pixels. In addition, you can determine whether the

fields are to be aligned on the grid or not.

6: Here, you can determine the foreground color for labels (e.g. field identifiers, comments) and the background color for the tab.

To create a new tab, name tab and define settings, then confirm with "New".

To change an existing tab, click on it, make changes and confirm with "change".

Important When creating a new archive, the first tab created has to be confirmed with "change" , as it represents a change of the - always existing - "Page?1" tab.

Further commands:

"reset"	undo all settings not yet entered (new definitions as well as changes) and set the default values.
"delete"	deletes the tab, which is in the foreground. This button can only be selected, if there is more than one tab.
"OK"	saves the set definitions of all tabs; the "forms" dialogue will appear again.
"cancel"	discards all new settings and changes.

14.5 Insert elements

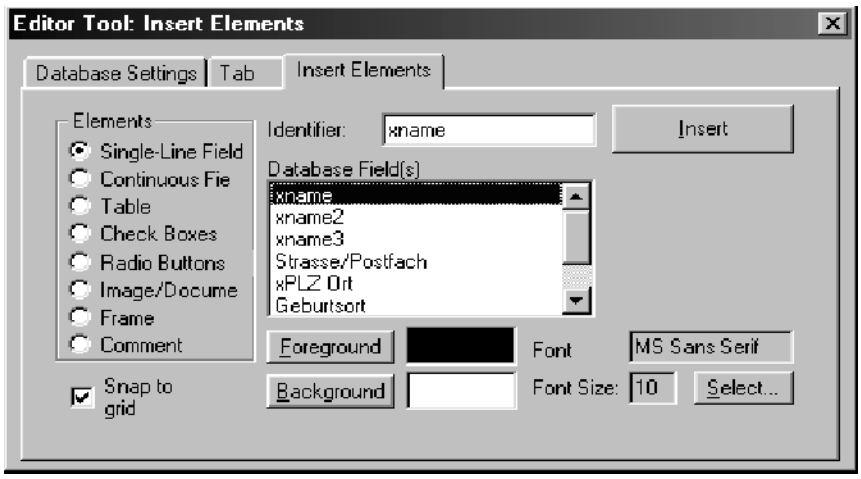
As soon as you have created at least one tab, you can include the fields defined in "database settings" and other elements like frames and comments as well as headings in the tab. Click on "insert elements" in the editor window.

At first, determine the tabs where you want to add elements. If the required tab is covered by other tabs and you do not see it behind the editor window, it has to be moved into the foreground: click on the name for the tab you want to change: the required tab is now shown behind the editor window and you can insert the elements.

Tip

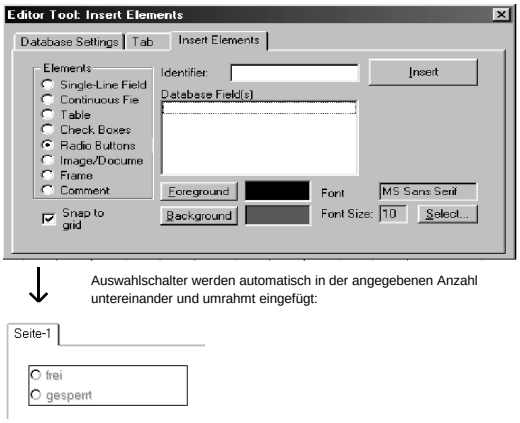
We recommend you consider the positioning of the individual elements prior to inserting the database fields: **Dr.Doc**® positions the elements on the tab from top left to bottom left. As soon as the bottom end of the screen is reached, any further elements are again inserted on the right half of the screen from top to bottom. Therefore we recommend you insert the elements in the required order straight away. You can subsequently change the position of the elements, but you should consider that each element can only be moved on its own, as multiple selection is not possible.

MORE INFORMATION ON THIS TOPIC IS INCLUDED IN CHAPTER:
- 14.6 EDIT ELEMENTS

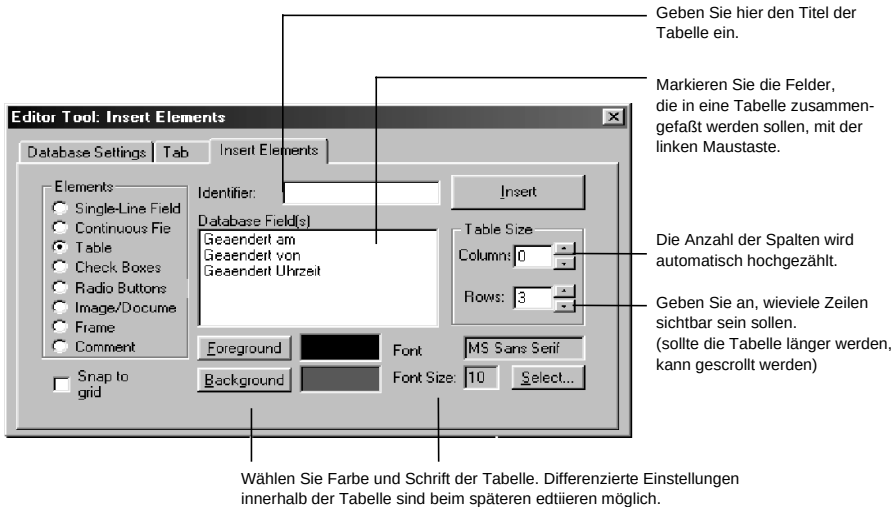


At first, determine the element type from the list of elements. The adjacent column shows the existing fields for this type.
Then select the required database field, change the color and font setting if required and then click on the "paste"button:
The field identifier and the field are transferred to the tab and the database field is removed from the list of available database fields. The individual positioning of the fields takes place later (see next chapter).

Special case radio buttons:



Special case table:



The column width can be changed individually when editing later.

Tip

Tables and continuous fields can be increased when entering data via a button in the lower right field area. You can then view them in their own large window. It is not necessary to accommodate as much as possible in "small" view.

In addition to the defined database fields, the following are available as elements:

"image"	Inserts the so-called small image element, in which the documents archived with internal view are shown as preview.
"frame"	Inserts a frame, which may also have a title. The frame can be positioned around several fields.
"comment"	Inserts a text (which has to be entered here), which may contain an explanation on an entry into a certain field.

Note

If you have already automatically created the "modified by/on/at" fields with the **Dr.Doc**®-assistant: These fields are defined as table fields, which you insert into the mask.

When all elements required in the mask have been inserted, you should hold with the "save"button in the top command line.

14.6 Edit elements

You can select between various presentation types, e.g. typeface, size, color and frame etc for each individual element with the "edit elements" function. It is also possible to subsequently change or delete elements.

You reach "Edit elements"by double-clicking on the element concerned on the tab::

Tip

Keep hiding the editor window with the "Tool small" command

in the upper command line to have the screen free for the positioning of elements.
Important: Do ***not*** click on the close icon in the editor window, as this completely closes the editor!

There is an individual edit window for each field type, which are described in the following subchapters. The positioning process is the same for all elements:

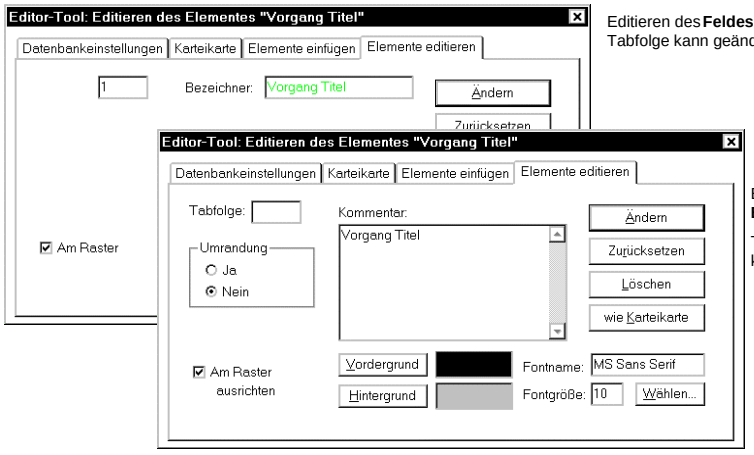
1. Double-click on the element: The element is activated, which is identified by handles at the element edge. The cursor is given the following form: E
2. Click on the element, hold the mouse button down and move it to the required position on the tab.
3. Change the width and/or height of the element by double-clicking on the element and moving the cursor to the handles. The cursor is given this form: Ö Hold the mouse down and change the size by pulling.

The following applies to all editing options described here:

- Changes will be executed as soon as you click on "change".
- The "as tab" command adopts the formating settings of the tab for the current element.
- "reset" undo the changes.
- "delete" removes the selected element from the tab and makes it available again in the list box of elements to be inserted.
- "snap to grid" decides whether the element is snapped at the grid coordinates when moving or whether it can be moved freely.

- Tab order: For data entry, you can determine the order for jumping to the individual fields when pressing the tabulator key (can only be edited, if the field itself (i.e. not the identifier) is selected).
- Field identifiers can be changed here as well as in the database settings.

14.6.1 Single-line field



Editieren des **Feldes**
Tabfolge kann geändert werden.

Editieren des **Bezeichners**

Text und Umrandung können geändert werden.

Bei beiden können geändert werden (unabhängig voneinander!): Farben, Schrift und Rasterausrichtung.

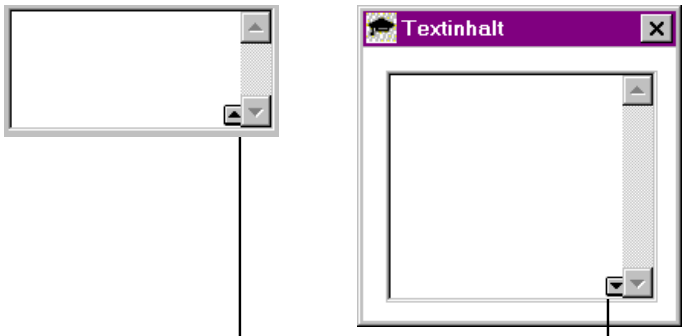
Single-line fields can be scrolled horizontally, i.e. an entry may be longer than the width of the element. The maximum entry in a single-line field is 128 characters (regardless how wide the field is).

14.6.2 Continuous field

See illustration in the SINGLE-LINE FIELD chapter for options on making changes!

You can input text continuously when entering records in continuous fields; the line break is automatic. In addition, a certain number of lines is not prescribed. If

the viewable lines of the continuous field are filled, the text is moved up. A maximum of 655360 characters (640KB) fit into a continuous field.

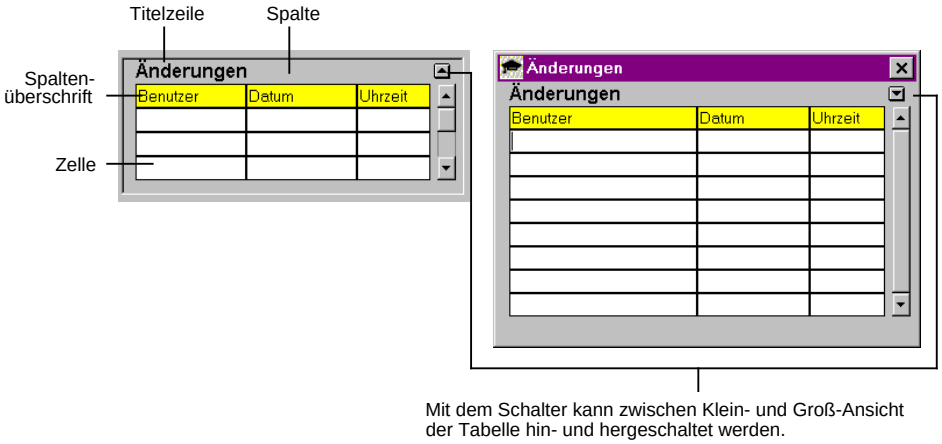


Mit dem Schalter kann zwischen Klein- und Groß-Ansicht des Endlostextes hin- und hergeschaltet werden.

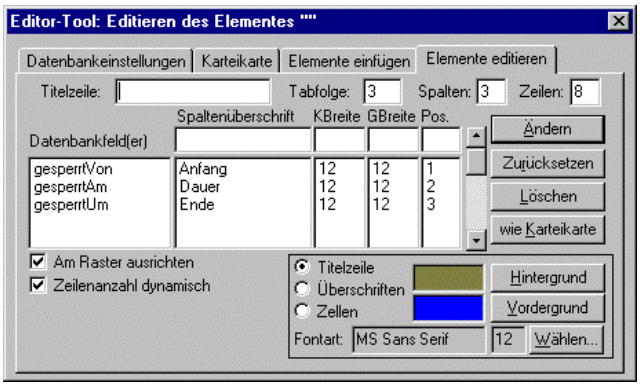
The large view is an independent window which can be enlarged and reduced when editing or making new entries, while the small view has a fixed positions on the tab.

14.6.3 Table

One or several fields are presented as columns in tables. That means that in contrast to the single-line field, a record may have several entries (repeat field) in a table field.
Fields predefined as “table” are combined into a table by selecting these fields together and adopting them in the required tab.



The large view is an independent window which can be enlarged and reduced when editing or making new entries, while the small view has a fixed position on the tab. In record view, the cursor automatically moves to the end of the table, to the most current entry.

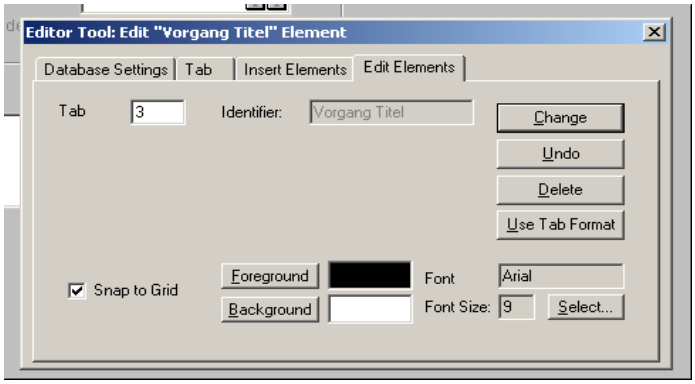


You can determine the following settings:

Title line	Enter/change text
Tab order	Tab order of the table (=first column, first line) within the tab
Column heading	Corresponds to the identifiers of the fields. These can also be changed here.
SWidth	Width of the column in small view
LWidth	Width of the column in large view
Pos	Position of the column in the table (from left to right)
Colors/Font	Different colors and fonts can be selected for the title line, headings and cells

14.6.4 Button

When entering data, a button only offers the options "on" (selected) or "off" (not selected).

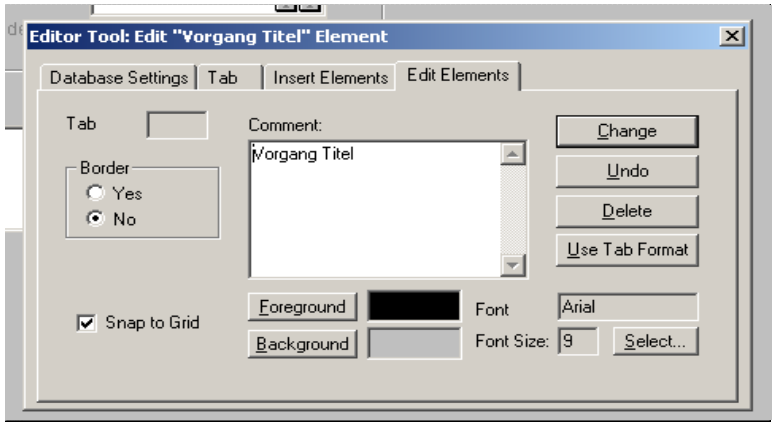


Identifiers, colors and font as well as snap on grid can be entered or changed.

Note

There is also the option to accept buttons e.g. onto the select list. In this case, a selected button is identified with "1" and a blank button with "0".
Please also consider the particular details when searching button entries while searching fields..

14.6.5 Image



The field type “image” can only be assigned once per mask. It does not have to be predefined in the database settings, but can be added directly via “image/document” in the “insert elements” card of the mask.
Colors and font as well as snap on grid can be changed for showing the small image. The identifier is firmly preset here.
In addition, several pages of the image document are shown at the same time in the small image window as preview (thumbnail) by using image splitting.
Select how many pages can be viewed in one go by entering the columns and lines.

Tip

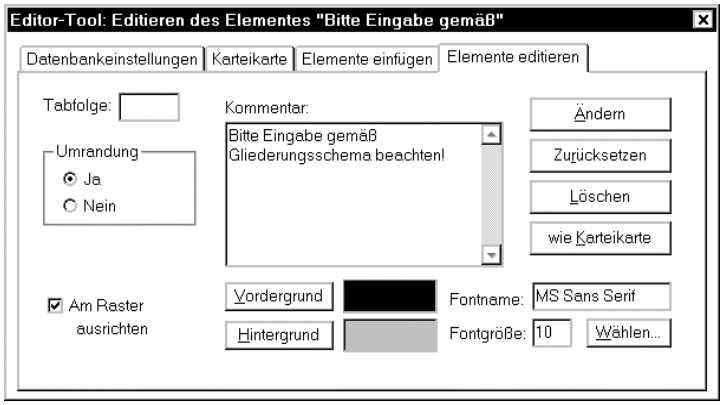
Memory management for the small image

The larger the number of image pages displayed at the same time the more memory is required. We recommend you do not use splitting too much so that the main memory does not become overloaded.
The number of previews loaded into the memory at the same time is determined in an entry in the Dr.Doc initialising file archive.ini. The default value is "1" - i.e. when browsing 250 images only one image stays in the memory. If images are split, the value is increased accordingly: e.g. for 3 columns and 3 lines the entered value is "12".
The maximum number of small images can also be changed manually.
Change the entry "MAX_SMALLIMAGE_NUMBER=1 to the required number.

14.6.6 Further elements

Apart from the elements already listed the following are also available:

- Frame:
  for visually grouping individual elements.
  Title, colors, font and snap on grid can be changed for this purpose
- Comment:
  Fixed (i.e. which cannot be changed by the user) comments can be created for the individual fields.
  Text, colors, font, snap on grid and frame can be changed for this purpose.

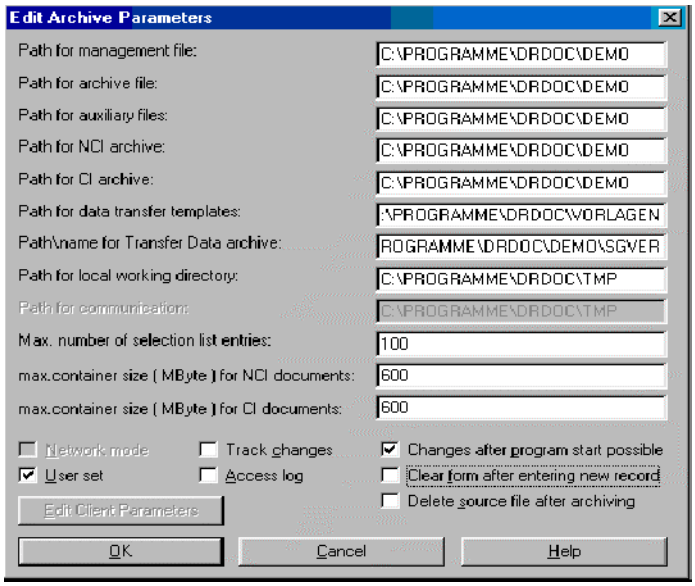


14.7 Edit archive parameter

14.7.1 Set up paths for local and standard net archives:

C/S Setting up C/S archives is described separately under point 14.7.2!

Call "management/edit archive parameter ..." in the newly set up archive or in the archive, in which changes are to be made.
Call standard network archives from a workstation (i.e. not at the server).



Check the preset entries and correct them if required. You either move from line to line with the TAB key or by clicking with the left mouse button.

Tip The same path is generally selected for management, archive and help files for local or standard network archives.

- Management file:

The management file includes all basic path information for calling an archive. The archive itself is always called with this management file (extension da). That means: The path stated here is the path from which the archive is later started.

- Archive files:
  The profile data and internal management data is filed in this path.
- Help files:
  The various archive-specific settings are considered help files.

Important

If the path details for management, archive and/or help files are subsequently changed in an existing archive, the files concerned are automatically copied into the new directory and deleted in the old directory when exiting "edit archive parameter.... "

- NCI and CI archive:
  The archived documents are filed in two "Container files", which are managed by **Dr.Doc**®. Data is separated into the file for CI documents and the file for NCI documents. Both files can be created on any data media - from the hard disk to the jukebox. The data medium you select depends on the number and size of the documents to be archived. Enter the corresponding drive or the path here.
  Be aware that it is not possible to archive directly on worm media.

Important

The path details for NCI and CI archives can be changed at any time like all other details, too. But you should be aware that already archived documents remain filed in the path stated at the time of archiving. If you want to make any changes, please refer to chapter 23 CHANGE PATH DETAILS!

- Container size
  The container size for NCI and CI documents can be set. As soon as the preset container size has been reached, **Dr.Doc**® automatically creates new containers. The container in the directory structure is always created on the same level in accordance with presetting e.g.: D:\drdoc\dbase\NCI00; ...\NCI01; ...\NCI02 (NCI00 = directory name) The default setting is 600 MB. The maximum size is 2GB.
  Optionally it is possible to form a container pool, with a strictly predefined container structure

- Path for TD templates:

To transfer data to other programs (e.g. address data on a word processing letter form), templates (forms, e.g. WinWord standard letter documents) must be created in these programs. These templates should be filed in a single directory and its content is always displayed when calling data transfer. Enter this directory here.

- Path \ Name for TD archiving:
  The archive stated here is automatically called for archiving the created document after working with the data transfer interface from within an archive. Enter drive, directory and name of the archive, if you require this automatic archiving.

- Local work directory:
  The local work directory is required to temporarily hold files for various actions and user-specific settings. Enter this path (default c:\drdoc\tmp) here.
  In network mode, a local drive of the workstation must be stated. This directory must be identical on every workstation.

- Maximum number of list box entries:
  This entry concerns the select list, which is shown after a search if several hits exist.
  The maximum default number of entries shown is 100. This entry has no influence on the number of records found, but only on the speed of the display or when browsing the list and the records. A smaller number may be sensible for very large data stock. With the "Next" and "Previous" commands the next 100 (or the stated number) records found are activated.

- User set:
  If this option is deactivated, the archive will be removed from the current user set. The archive can only be reentered into a user set via "management/user manager".

- Track changes:
  To log changes of the profile data (text before/after), track changes must be created.

- Access log:

To log access attempts with incorrect passwords or unauthorized access to documents, an access log must be created.

- Changes after program start possible:
  Dr.Doc® offers you various basic work modes. The "change possible" mode allows you to view your records and also make corrections. The "change locked" mode allows you to view the records, but not to change. Activate the option for "change possible" or deactivate it for "change locked".

Note

This option is regarded as a basic setting. In addition, further differentiation is also possible via the user set.

- Delete form after entering new record:
  Activate the option, if you want to see the blank input mask again after entering a new record. Deactivate the option, if the entered profile data is to remain in the mask. This is particularly advantageous, if only minor details change in several records and the rest of the records is the same.

Note

This option is regarded as a basic setting. In addition, further differentiation is also possible by only maintaining entries in selected fields.

MORE INFORMATION ON THIS SUBJECT IS INCLUDED IN CHAPTER:

- 18.1.7 MAINTAIN FIELD ENTRIES WHEN ENTERING NEW RECORD

- Delete source file after archiving
  After successfully archiving an existing file, it is no longer required in the original form and can be deleted. This deletion can be automated with the "delete source file" option.

- Network mode:
  Activate the option for standard net archives

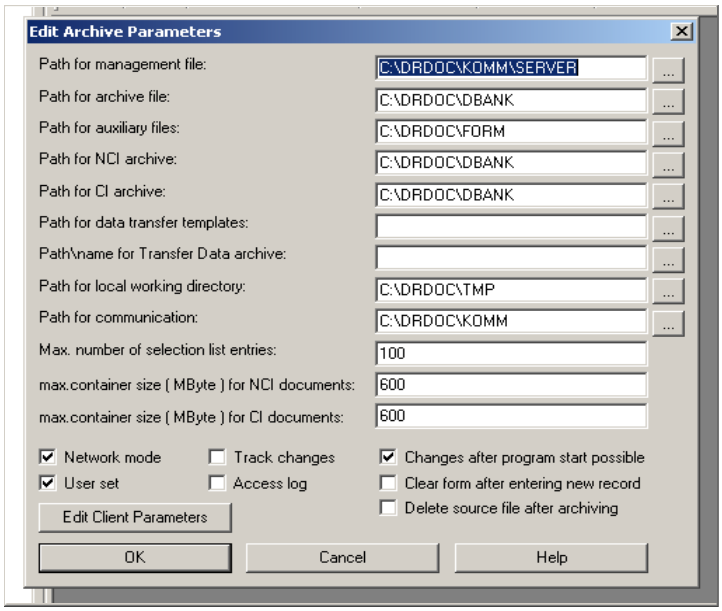
Note

No further path details have to be entered for standard net archives. The "edit client parameter" command is not meant to be called, the communication path does not have to be taken into consideration either.

If you have completed all settings, save the data with the "OK" command.

14.7.2 Set up paths for C/S archives:

Call "management/ edit archive parameter..." at the archive server in the newly set up archive or in the archive, in which the changes are to be made. .



Check the preset entries and correct them if required. You either move from line to line with the TAB key or by clicking with the left mouse button.

At first enter all path details from the view of the archive server in the following. That means: If archive and network server are combined in one device, enter the local drive name from the view of the server everywhere.
If archive and network server are separate, some details apply to a drive on the network server, which then has to have the name from the view of the archive server. This is then noted at the positions concerned.

- Management file:
  The management file includes all basic path information for calling an archive. The archive itself is always called with this management file (extension da). That means: The path stated here is the path from which the archive is later started.
  In C/S mode, two management files are created for one archive: For calling at the archive server and for calling at the client.
  Now enter the path for the call at the archive server. The subdirectory COMM\SERVER is preset for this.

- Archive files:
  The profile data and internal management data is filed in this path. The subdirectory DBASE is preset for it.
  If archive and network server are separate, this directory must be on the archive server (i.e.: local drive name).

- Help files:
  The various archive-specific settings are considered help files. The subdirectory FORM is preset.
  If archive and network server are separate, the directory can be on the network server. Recommended configuration: create on archive server.

Important If the path details for management, archive and/or help files are subsequently changed in an existing archive, the files concerned are automatically copied into the new directory and deleted in the old directory when exiting "edit archive parameter.... "

- NCI and CI archive:
  The archived documents are filed in two "Container files", which are managed by **Dr.Doc**®. Data is separated into the file for CI documents and the file for NCI documents. Both files can be created on any data media - from the hard disk to the jukebox. The data medium you select depends on the number and size of the documents to be archived. Enter the corresponding drive or the path here.
  Be aware that it is not possible to archive directly on worm media.

- Container size

The container size for NCI and CI documents can be set. As soon as the preset container size has been reached, **Dr.Doc**® automatically creates new containers. The container in the directory structure is always created on the same level in accordance with presetting e.g.: D:\drdoc\dbase\NCI00; ...\NCI01; ...\NCI02 (NCI00 = directory name) The default setting is 600 MB. The maximum size is 2GB.
Optionally it is possible to form a container pool, with a strictly predefined container structure

Important

The path details for NCI and CI archives can be changed at any time like all other details, too. But you should be aware that already archived documents remain filed in the path stated at the time of archiving. If you want to make any changes, please refer to chapter 23 CHANGE PATH DETAILS!

- TD templates:
  To transfer data to other programs (e.g. address data in a standard word processing letter document), templates (forms) must be created in these programs. These templates should be filed in a single directory and its content is always displayed when calling data transfer. Enter this directory here.

- TD archiving:
  After working with the data transfer interface from within an archive, the archive stated here is called automatically for filing the created file. Enter drive, directory and name of the archive, if you require this automatic archiving.

C/S

For C/S archives this path must be set in the “Edit client parameter” dialogue (see corresponding point in this chapter)

- Local work directory:
  The local work directory is required to temporarily hold files for various actions and some user-specific settings. Enter this path (default c:\drdoc\tmp) here.
  If archive and network server are separate, the directory can be on the network server. Recommended configuration: create on archive server.

- Path for communication:

This path contains the different tasks of the clients when working together in the archive. The subdirectory must be called COMM.
This directory is also required for calling an archive at the archive server (the file concerned is in the subdirectory COMM\SERVER).
If archive and network server are separate, the directory can be on the network server (i.e.: Network drive name from the view of the client).
Recommended configuration: create locally on archive server.

- Maximum number of list box entries:
  This entry concerns the select list, which is shown after a search if several hits exist.
  The maximum default number of entries shown is 100. This entry has no influence on the number of records found, but only on the speed of the display or when browsing the list and the records. A smaller number may be sensible for very large data stock.

Tip

Change maximum list box entries subject to requirement
If selections are made on a larger select list, you should take into consideration that the selections will be deleted, if the list is browsed with "Next" and "Previous". It is therefore sensible not to set the number too high and only to increase it short-term for major changes.

- Changes after program start possible:
  Dr.Doc® offers you various basic work modes. The "change possible" mode allows you to view your records and also make corrections. The "change locked" mode allows you to view the records, but not to change. Activate the option for "change possible" or deactivate it for "change locked".

Note

This option is regarded as a basic setting. In addition, a differentiation is also possible via the user set.

- User set:
  If this option is deactivated, the archive will be removed from the current user set. The archive can only be reentered into a user set via "management/user manager".

- Track changes:
  To log changes of the profile data (text before/after), track changes must be created.

- Access log:
  To log access attempts with incorrect passwords or unauthorized access to documents, an access log must be created.

- Delete form after entering new record:
  Activate the option, if you want to see the blank input mask again after entering a new record. Deactivate the option, if the entered profile data is to remain in the mask. This is particularly advantageous, if only minor details change in several records and the rest of the records is the same.

Note

This option is regarded as a basic setting. In addition, further differentiation is also possible by only maintaining entries in selected fields.

MORE INFORMATION ON THIS SUBJECT IS INCLUDED IN CHAPTER:

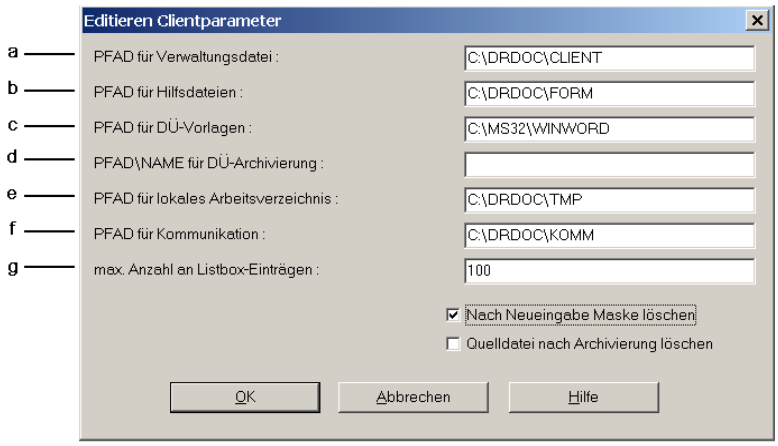
- 18.1.7 MAINTAIN FIELD ENTRIES WHEN ENTERING NEW RECORD

- Network mode:
  This option must be activated.

- Delete source file after archiving:
  After successfully archiving an existing file, it is no longer required in the original form and can be deleted. This deletion can be automated with the "delete source file" option.

- Edit client parameter
  If you have defined all settings, call the client parameter now. These path details are for calling the archive from the client.

Important **Please only edit the paths c and d! The other paths are automatically determined by Dr.Doc® .**



a: Management file:
Configuration file for C/S archive call. The subdirectory CLIENT is preset **Do Not Edit!**

b: Help files (database configuration files)
Do Not Edit!

c: TD templates:
Enter the location where the template files for transferring data can be

found in the network as seen by the client.

d: Automatic archiving after TD:
To call automatic archiving following a data transfer (TD) from the client, you have to enter: <Host name or IP address of the archive server>\<Port No.>\<archive name>
e.g. SERVER1\9995\Archive1

e: Local working directory:
The local work directory must be available identically and physically on each client. .

f: Path for communication:
Do Not Edit!

Confirm the client parameter with "OK".

Tip

The client parameter can only be edited by the supervisor and only at the archive server. If e.g. a change of the basic "delete form after entering new record" option is necessary for the clients, it must be executed at the archive server and then applies to all.
Please be aware that this change at the archive server can only be executed, if the server process at the archive server was previously terminated.

Now save the settings with the "OK"command.

14.7.3 Summarising overview of C/S paths:

The path configuration examples stated apply to both cases:

(a) NET AND ARCHIVE SERVER ARE ONE DEVICE
(b) NET AND ARCHIVE SERVER ARE TWO DEVICES (E.G. NOVELL-NET):

Path for...	**Device**	**Server parameter**	**Client parameter**
Management file	S	C:\drdoc\comm\server	C:\drdoc\client
Archive files	S	C:\drdoc\dbase	----
Help files	S	C:\drdoc\form	C:\drdoc\form
NCI archive	(S)	C:\drdoc\dbase\NCI00(default; or: Jukebox-LW etc.)	----
CI archive	(S)	C:\drdoc\dbase\CI00(default; or: Jukebox-LW etc.)	----
Local WD	S, Cl	C:\drdoc\tmp	C:\drdoc\tmp
Communication	S	C:\drdoc\comm	C:\drdoc\comm

15. VERSION MANAGEMENT

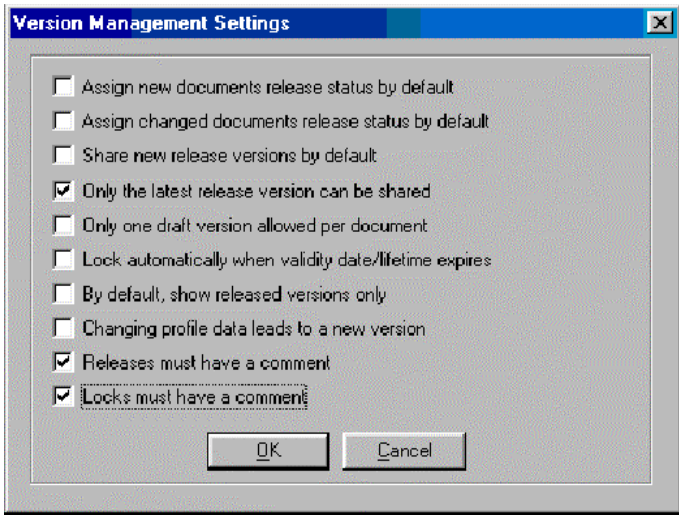
The **Dr.Doc**® version management enables the management of different document versions.
A document can have various statuses:

- draft

  ↓

- release
  - free
  - locked

A draft version can be transformed into a release version, but not vice versa (i.e., a release cannot be reset to draft status!)
It is configured via "Settings/version management":


Version Management Settings
Assign new documents release status by default
Assign changed documents release status by default
Share new release versions by default
Only the latest release version can be shared
Only one draft version allowed per document
Lock automatically when validity date/lifetime expires
By default, show released versions only
Changing profile data leads to a new version
Releases must have a comment
Locks must have a comment
OK
Cancel

Explanations:

- Only one free release is permitted per document!
- first option deactivated means: New document has "draft status":

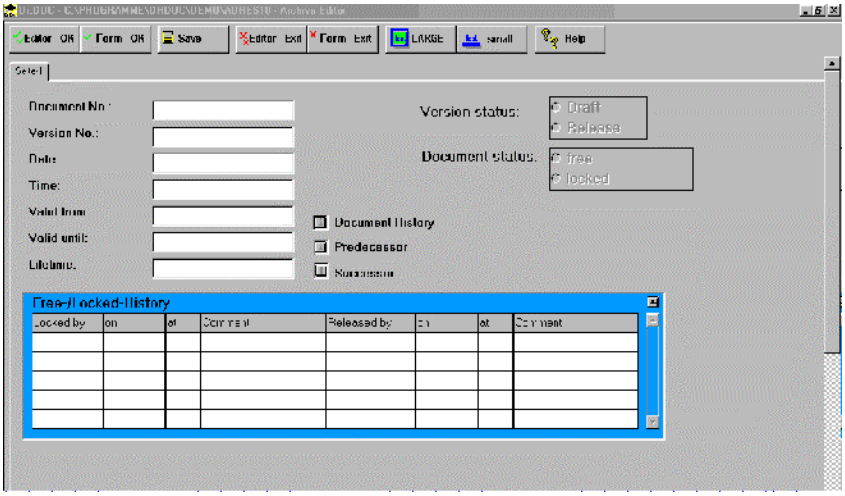
Changes to a draft do not lead to a new version

- Use: common problem with data transfer: a letter archived after data transfer is to be edited/corrected (led to a new document so far!, now old version is overwritten)

Changes to a release leads to new version!

The version management can be activated on creating a new archive via "archive new" as **Dr.Doc**® function. (The database fields shown below are automatically generated; as approx. 20 database fields are generated, this option should only be activated if there is a real need so that the database structure is kept small.)

Database fields / Mask elements:



Can be called via [i]:

· [i] document history
· [i] predecessor
· [i] successor

16. USER SET

16.1 Basics

The user manager is an across-archive function for setting up and managing users and their archive-specific access rights and rights to use. Permissions can be differentiated for archives, forms, records and fields. They can be assigned individually to a single user or to a user group, where the permissions then apply to all members of the group.

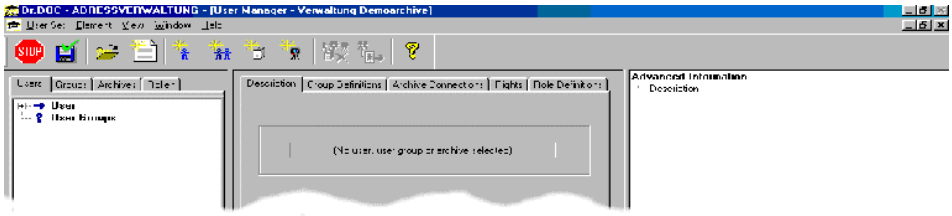
Users are usually entered by name in the user set. In addition, there are anonymous users, who are allocated a predefined user profile.

Two users are always automatically in a new user set or are automatically linked with newly entered archives: DRDOC and PUBLIC.

User DRDOC:
If this user name (with the associated password) exists, there will be no user query when the archive is called. If a user set is not required, this entry should not be deleted in a single user version.
If the user set is supposed to be used in a single user version or several licenses exist for several users to work simultaneously, this existing user entry must first be deleted and an individual supervisor user with password must immediately be set up in the same operation.

User PUBLIC:
Various settings of an archive are saved user-specific, that means: every user has only acess to his/her own settings.
But usually, settings that are generally available are also sensible. The user PUBLIC is required for this purpose: If you are registered with this user name and you define settings, these can be used by all users of the archive. Only the user PUBLIC can change these general settings.
In contrast to the user DRDOC, only the user name (case-sensitive!) is preset for the user PUBLIC. The password and the access rights can be set at liberty.

The user manager is called under "management/user manager".



The user manager dialogue is divided into three columns:

Left column:
displays users, user groups and archives on tabs on lists. When inputting a new entry (via "Element/..."), the corresponding list is automatically updated. Here, you also select the relevant element, for which you want to define the settings.
The "user" register comprises an alphabetic user overview as well as an alphabetic group overview (which again includes the users). However, the "group overview" register is only arranged according to groups. Finally, the "archives" register includes all archives assigned to the user set in alphabetic order.

Middle column:
You can define the settings for the various elements in this column. The settings options are divided into several tabs.

Right column:
The right column contains a complete overview of all users and user groups, archives and settings. Its only purpose is to provide clear information; the entries are automatically input by the program.

In addition, the user manager has its own toolbar:

Exit / save user manager

Open / create new user set

Create new user / user group / archive

Delete user, user group, archive / group membership

Help

Enter new role (described in the separate workflow module illustration)

Note

The “Role definition“ tab (middle column) and the “Enter new role“ button are described in the separate illustration for the “Workflow module“!

The user manager is called up via "Management/user manager" (regardless whether an archive is open or not), if

- a user set is not yet loaded
- the user is registered in at least one user set, in which s/he has access permission for the manager.

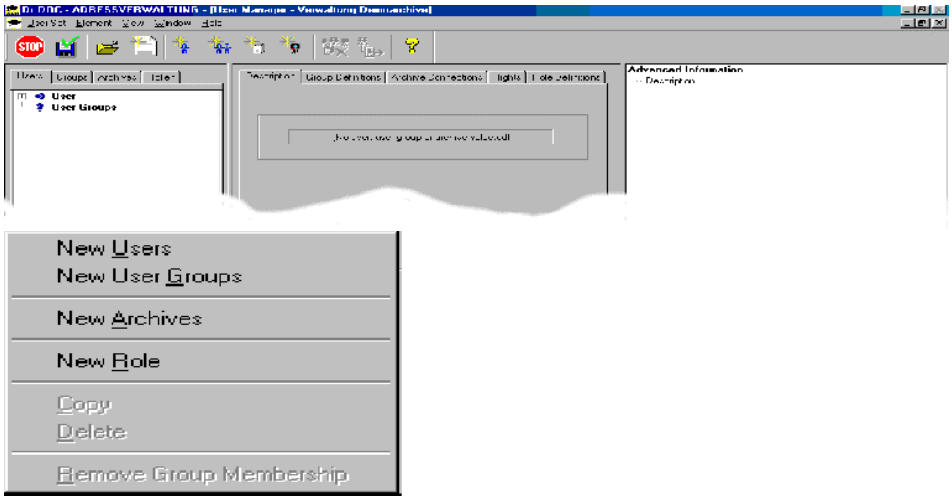
16.2 Brief instructions user set

Procedure:

1. Create user groups, enter users into user groups and enter archives
2. Assign user groups the following properties
   a. Archives
   b. Rights (archive, record, field and form)

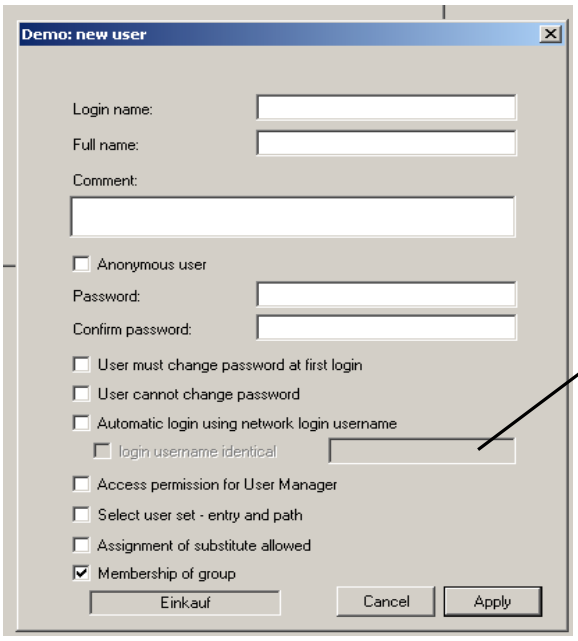
▶ 1) Create user, enter user groups and archives:

Click on "Group overview" register in the left column of the user manager. Call up the context menu with the right mouse button or use icons



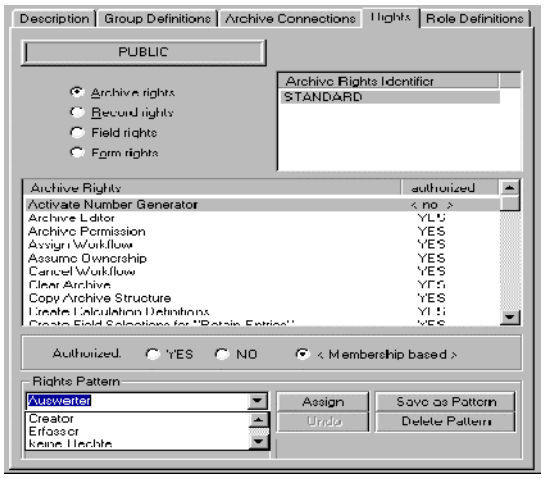
▶ Enter new user

The following dialogue will appear when a new user is created, if the steps described above are followed and if you click on “new user“ on the context menu. The login name may have more than 7 characters.
If the “Automatic login with network login name“ option is activated, the user does not have to separately log onto **Dr.Doc**® when **Dr.Doc**® is started. If the network login name is different to the **Dr.Doc**® login name, this can be controlled by deactivating the “Identical login names“ field and entering the network login name into the field (to adapt existing user sets)
“Automatic login with network login name“ is optional for all users or can be activated user-specific (“Management/user manager“ and then “User set/ properties“)



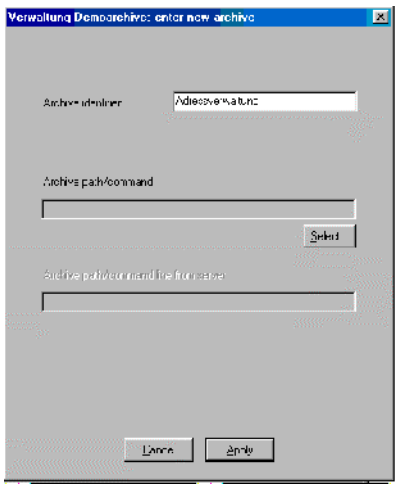
This field will appear, if you select a group under „Group overview“ and you want to enter a new user for this group.

You determine the user’s rights under “Rights/rights pattern”.



▶ Subsequent changes to user and archive entries:

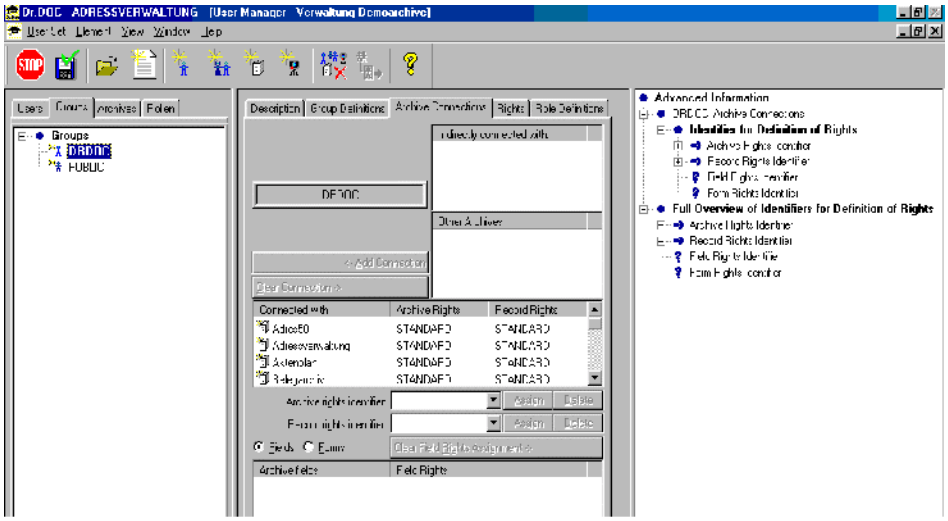
Select user or archive under “Group overview“ or “Archives“ and edit properties via “Description“. Changes are automatically applied. When you leave the user set, you have to save the changes.



▶ 2a) Assign archives to user groups (users)

Example: The “Address management“ and “Document management“ archives are to be assigned to the super group: click on “Super group“ in “Group

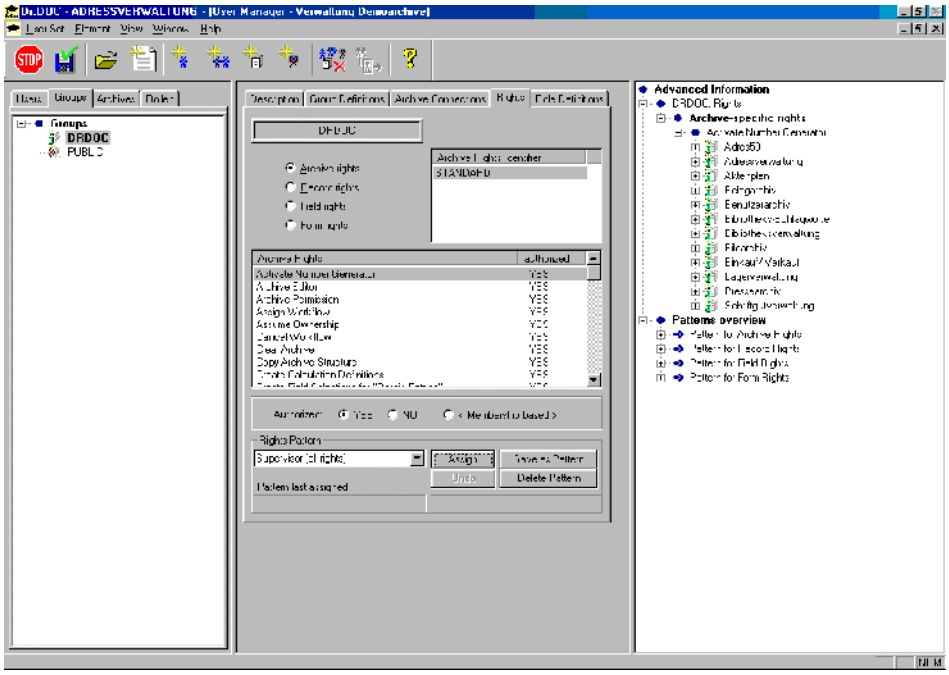
overview“, then select the two archives one after another in “Archive associations“ in the “Other archives“ window and assign with a double-click or „<-Add association“.



▶ 2b) Assign rights

Simplest case:
Only group-specific differentiation (the same rights are issued for several archives, i.e. no differentiation within the archives)

Assign the identifiers group-specific rights definitions in the “Rights“ register (by selecting the group in the “Group overview“ register and subsequent definition and allocation of the rights properties on the basis of the “patterns“).



Complex differentiation (group-specific and archive(group)-specific) is done on the basis of “identifiers“ for rights definitions.

Example

Different archive rights are to be defined for the two archive categories “modifiable archives“ (includes “address management“ and “document management“) and Thesaurus archives (non-modifiable archives, includes Thesaurus archives with determined data stock). For this purpose, an archive right identifier “modifiable archives“ and Thesaurus archives in the “Archive associations“ register is assigned to these archive groups (select archive and enter archive rights identifier). Afterwards assign group-specific rights definitions to the identifiers (by selecting the group in the register “group overview“ and subsequent definition and allocation of the rights properties) in the “rights“ register.
(I.e.: archives can be combined virtually into groups via “identifier“. Group-specific right definition contents can be assigned to these identifiers)

Right patterns are not modifiable, but can be saved under another name in modified form.

Archive name	**Identifier (Rights)**	**User group**	**Rights**
Address archive	modifiable archives	Supervisor	Archive right: may, can do, knows everything
		Author	May make new entry and modify
Thesaurus archive	Thesaurus	Supervisor	Archive right: may do almost everything
		Author	may only view, not change or make new entries

16.3 User set

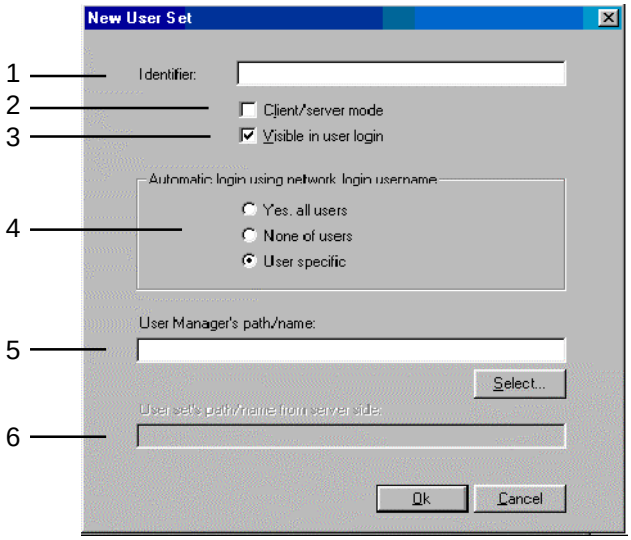
Several user sets can be used. A local user set is automatically created.

To create a new user set:

Step by step

➔ Call "Management/User manager".

➔ Click on "User set/New" or the corresponding icon.



1: Identifier for the new user set. Can be different to the file name.
2: Select for operation in client/server mode.
3: Select, if the user set making the enquiry is to be displayed at user login.
4: Select whether the login is to take place automatically with the network login name.
5: Enter path and file name for the user set (enter directly or via "select").
6: If a C/S user set is created, enter the path and file name from the server's view.

➔ Confirm with "OK". The new user set is now active.

▶ Open:

To change between different user sets, use "User set/Open" or the corresponding icon. Select the required one in the list box and confirm with "OK".

▶ Properties:

"User set/Properties" displays the descriptive dialog of the current user set, where changes can be made (name, path).

▶ Delete:

"User set/Delete" deletes a user set.

16.4 Users and user groups

▶ Create:

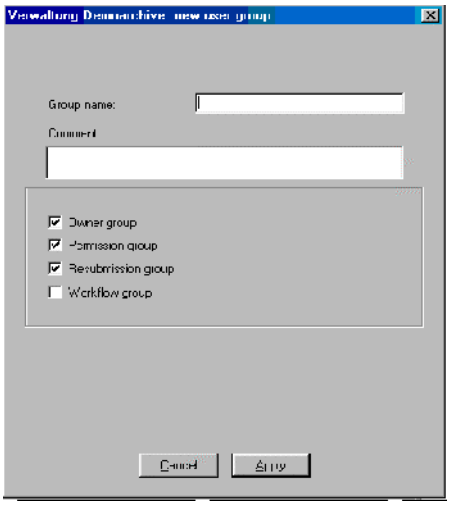
In most cases it makes sense to combine several users into groups. The advantage is that you do not have to assign rights separately to every user.
In addition, it is of course also possible to create individual users or to remove users from groups.

Note

As described, the user DRDOC automatically has the access right to each new archive. If this user exists, there will be no user query when calling the archive. For archives with several users, the user DRDOC must therefore be deleted or replaced by another "Supervisor" (who has all rights).

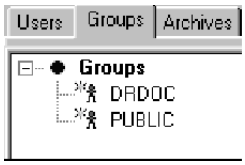
Step by

➔ Click on the "Group overview" register in the left column of the user manager
➔ Create a new user group with the icon or via the context menu of the right mouse button.



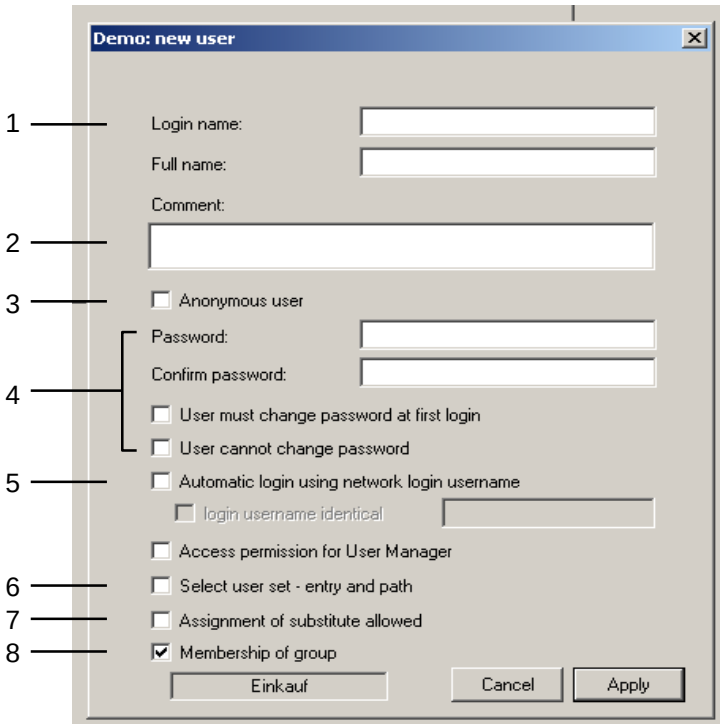
Name group, and describe if required, and determine, if it is an owner, permission and/or resubmission group.

➔ With "Apply" the new group is added to the group overview list (left column):



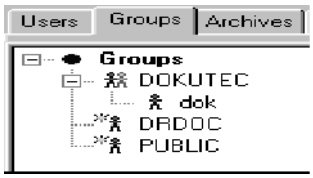
➔ If required, create more groups straight away or "close" the dialog. The data of each respective group is now in the "description" register in the manager's middle column.

➔ The new users are now entered into the respective group: at first select the group in the left column of the manager. Then enter users via the icon or the context menu of the right mouse button.



1: The login name must be entered in the user query; the complete name, which appears everywhere where the user name is displayed, may be different.
2: Space for comments regarding the user.
3: Select, if the user is to be anonymous.
4: The user login also requires a password. The password is always encrypted. To ensure that no errors are made when entering the password, it has to be entered twice for confirmation. Remember this is a case-sensitive entry.
   As an additional option you can select that the user has to change his/her password once or that s/he may not change the password.
5: If the option “Automatic login using network username“ is activated, the user does not have to login separately in **Dr.Doc**® when starting **Dr.Doc**®. If the network username is different to the **Dr.Doc**® login name, you can control this by deselecting “identical login name“ and entering the network username in the field (to adapt existing user sets).
   “Automatic login using network username“ is optional for all users or can be activated user-specifically (“Management/user manager“ and then “user set/ properties“)
6: Select if the user is to have access to the user manager.
7: Select if the user is also to see the path when selecting a user set.
8: Displays the group, which is selected when creating the user. If membership is not required, the option can be deactivated.

➔ "Apply" includes the new user on the group overview list (left column):



➔ If required, create more users or “close” the dialog. The data of the respective user is now entered in the middle column of the manager in the "description" register.

▶ Subsequent changes:

A group or a user's basic settings are changed via the "description" register in the middle column of the manager. In addition, membership of a group can be changed via the "User groups" register (add/remove membership).
The current display of the "user groups" tab always refers to the group or the user, which is selected in the left column of the manager.

Tip

Users and groups can also be copied. This can save a lot of time, if e.g. another group, which only differs slightly from an already existing one regarding its rights, is to be created.

16.5 Automate user login:

The user login when starting the program can be automated via an entry in the command line of the Dr.Doc® icon.
As already described in chapter 8.1, several parameters can be included here. Apart from the ones already stated, the command line can be extended according to the following pattern.

drdoc path\archive path\help path\userset autologin drdoclogin

C/S

The entries for local archives and C/S archives are different. For the client icon, the ***„path“*** must be replaced by **<host name or IP address of the archive server>\<port no.>** for entering the archives and the user set. If the help function is also used via the archive server, the path must also be replaced with the above details**!!!**
Example minimum configuration:
C:\drdoc\System\drdoc.exe SERVER1\9995\Archive1
Example extended configuration:
C:\DrDOC\System\drdoc.exe SERVER1\9995\Archive1 C:\drdoc\help\whelp SERVER1\user1.bvd AutoLogin=0

Parameter	**Explanation**
drdoc	drdoc.exe, possibly with path
path\archive	Path and name for the archive
path\help	Path and name for the help
path\user set	Path and name for the user set
autologin	AutoLogin=1 automatic login in all user sets with the same name or password AutoLogin=0 no automatic login
drdoclogin	DrdocLogin=1 automatic login as DRDOC DrdocLogin=0 no automatic login as DRDOC

User information in C/S mode:

C/S

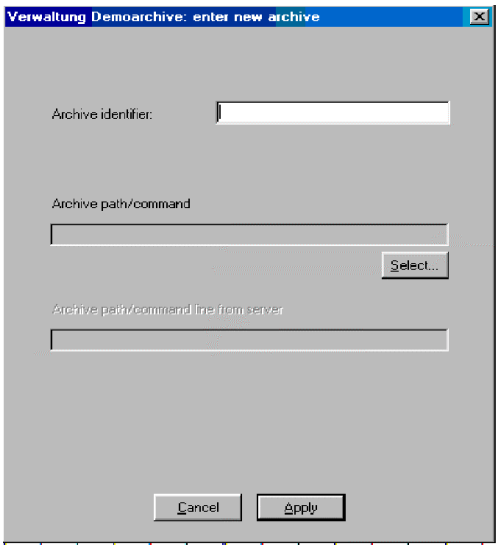
"Management/user information" shows the users currently registered in the network for the current archive. If required, a user can also be logged off here.

16.6 Enter archives

New archives are always entered in the user set; then the user(-groups) are assigned.

▶ New entry:

➔ Enter “new archives“ using the icon via the “Management/user manager/ element/new archives“ menu or via the context menu of the right mouse button.



Enter archive identifier (this name then appears on the list of archives under "Archive/select").
Enter archive path and file name (enter directly or via "select")
For C/S archives, also enter path from the server’s view.

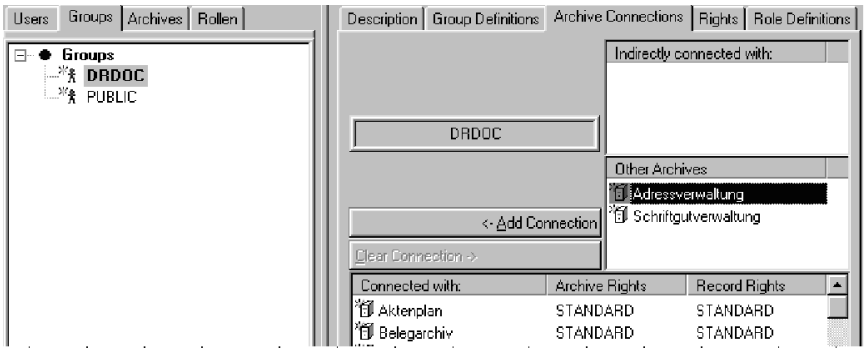
➔ "Apply" includes the new archive on the archives’ list (left column):

➔ If required, include more archives or “close” the dialog. The data of the respective archive is now entered in the manager’s middle column in the "description" register.

The archive is now entered in the user set and appears on the list under "Select archive".

16.7 Allocate archives to users and groups

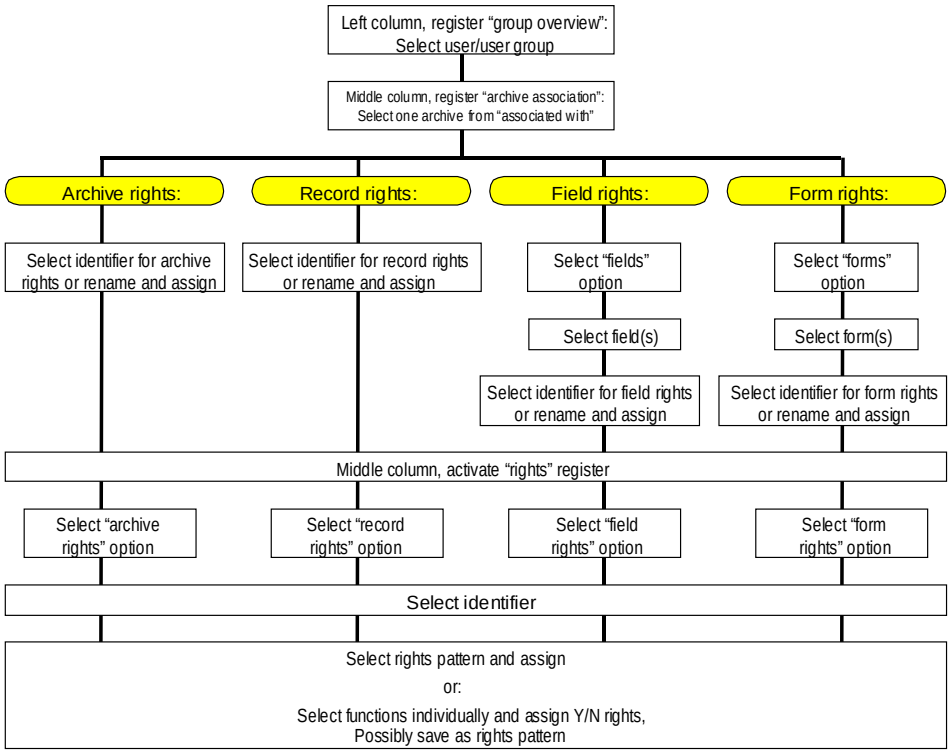
➔ In the group overview in the manager's left column click on the group or the individual user, which are to be allocated to the archive.
Select one archive after the other in the manager's middle column in the "Archive associations" register in the "Other archives" window and "Add association".



In this example, the archive "Address management" is assigned to the group "Superior department".

16.8 Assign rights

Rights have to be assigned to the users or the user groups. These can be differentiated from basic archive editing rights to rights in individual fields. The following flow chart shows you how to proceed.


Left column, register "group overview": Select user/user group
Middle column, register "archive association": Select one archive from "associated with"
Archive rights:
Record rights:
Field rights:
Form rights:
Select identifier for archive rights or rename and assign
Select identifier for record rights or rename and assign
Select "fields" option
Select "forms" option
Select field(s)
Select form(s)
Select identifier for field rights or rename and assign
Select identifier for form rights or rename and assign
Middle column, activate "rights" register
Select "archive rights" option
Select "record rights" option
Select "field rights" option
Select "form rights" option
Select identifier
Select rights pattern and assign
or:
Select functions individually and assign Y/N rights, Possibly save as rights pattern

Save the entries using "User set/Save" on the menu or by clicking on the icon.

Note

You can also view the archive, record and field rights for information (i.e. not to change) under the following menu items:
Management/Archive rights - record/permissions - edit/field rights.

17. ACCESS RIGHTS AND CONTROL

To control access to all data in Dr.Doc® you have the following options:

Access (incl. changes) to ...	**is controlled by...**
1. Entire archive	Archive associations in the user set
2. Entire record (= Profile data + document)	• Owner in conjunction with "record/owner " • Record rights in the user set • Work mode "changes after program start possible / not possible" • In principle for various functions: user set (Author/evaluator)
3. Individual profile data fields	Field rights in the user set
4. Document	Version management: • free / locked • draft / release

In addition, the access to and editing of data can be controlled:

The process ...	**is controlled by...**
5. New entry	Automatic fields B, D, T, in conjunction with change lock
6. Changes to profile data / documents (apply with "Save")	• Respective users: Automatic fields B, D, T in a table (table not necessary, if only the last change is to be registered) • Text change: Entry in track changes (text before/after)
7. Login with incorrect password	Entry in access log

Most of these access rules are only possible or sensible in connection with a user set.

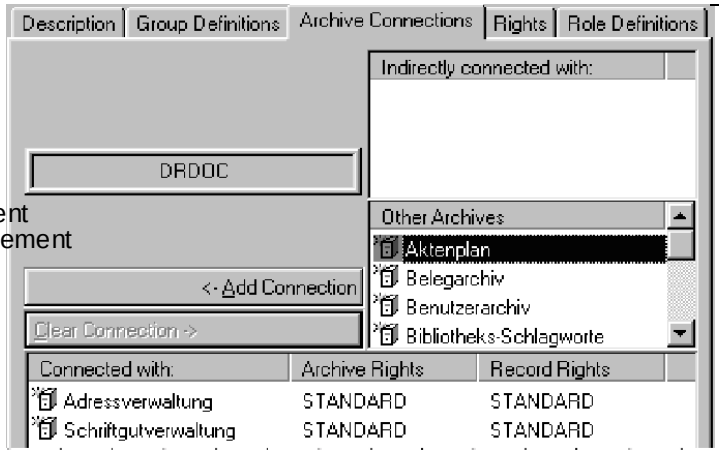
MORE INFORMATION ON THE TOPIC:
- 16 USER SET

17.1 Lock entire archive

You can determine the users or user groups that have access to an archive via the "Archive associations" tab under "Management/user manager".

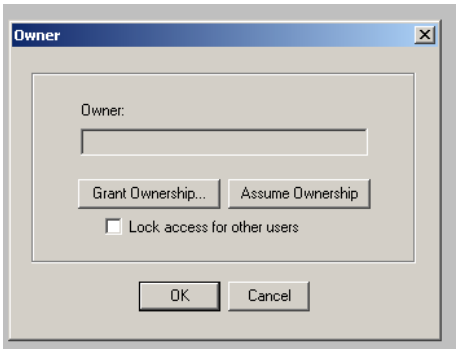
Example

User Kunert is on principle connected to address management and document management



17.2 Lock entire record

If a record is owned, only the owner (if s/he has the corresponding rights) can change other users' permissions for this record.
A record may be owned so it can be locked to prevent other users from editing/changing it or to make it only generally accessible after subsequent editing after archiving by batch processing (in the last case the user can be automatically entered as owner when the new records are saved, if the system is set up accordingly).



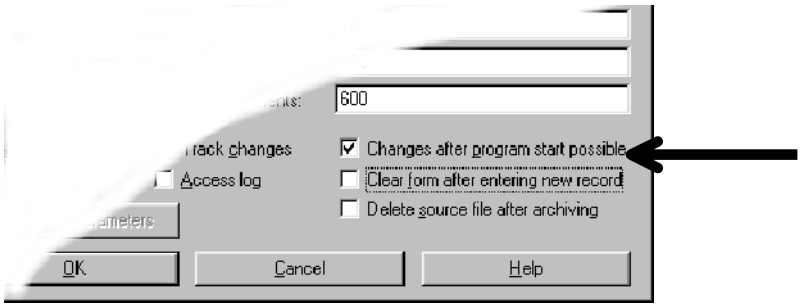
As the owner does not have the right to change other or all users' permissions in every case, this button (access lock for others users) makes it possible to automatically lock all other users' permissions for this record.

The relevant owner can be entered with the "record/owner" command within the new entry or when the record is open.

An efficient document ownership management is also possible from within the select list. If a record's owner wants to release it for others, s/he can do this by selecting the relevant record on the select list and by changing the owner rights via "record/owner".

▶ Work mode:

Under "Management/edit archive parameters" you can select whether all users are permitted to change existing records or not.



▶ User rights:

Users can be given a wide variety of access rights via the user set. This refers to new entries, changing, deleting, printing etc.

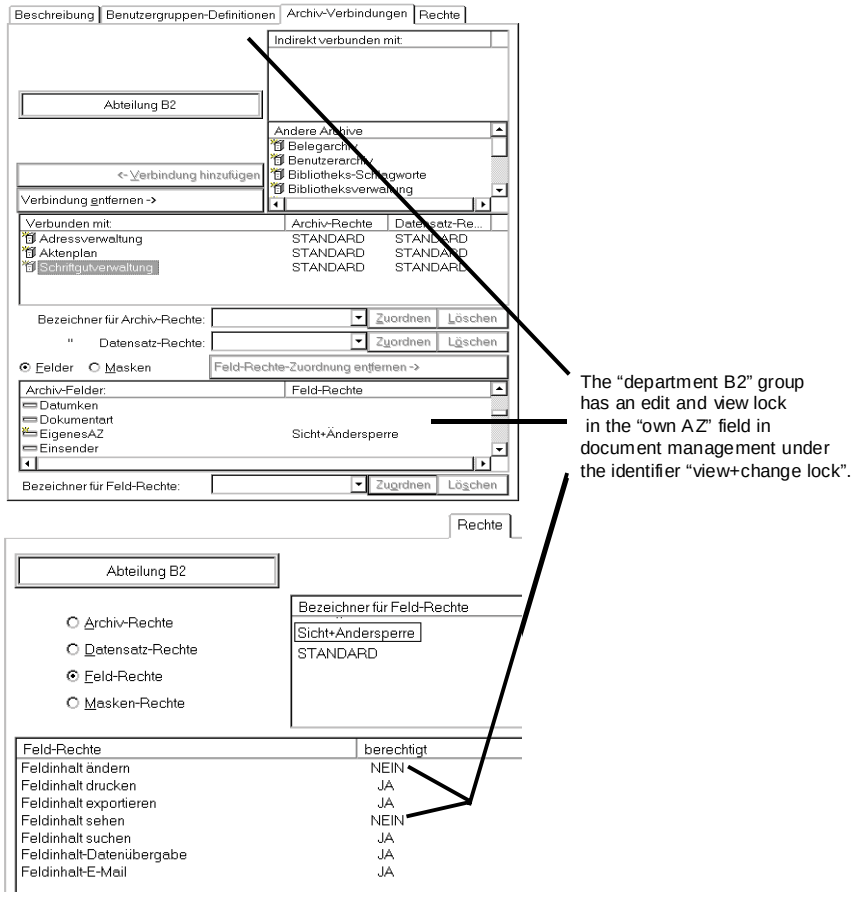
MORE INFORMATION ON THE TOPIC:

- 16 USER SET

17.3 Lock individual profile data fields

Individual profile data fields can be locked for editing. This is done by issuing field rights for the respective user or the user group within the user set.

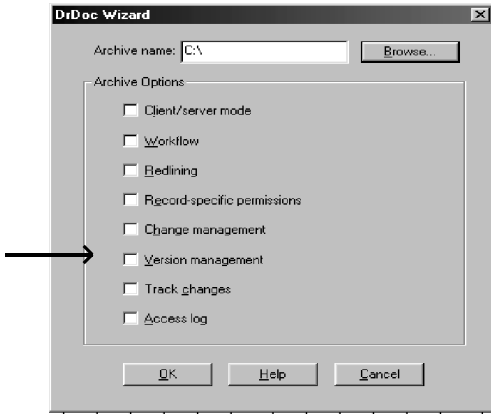
Example



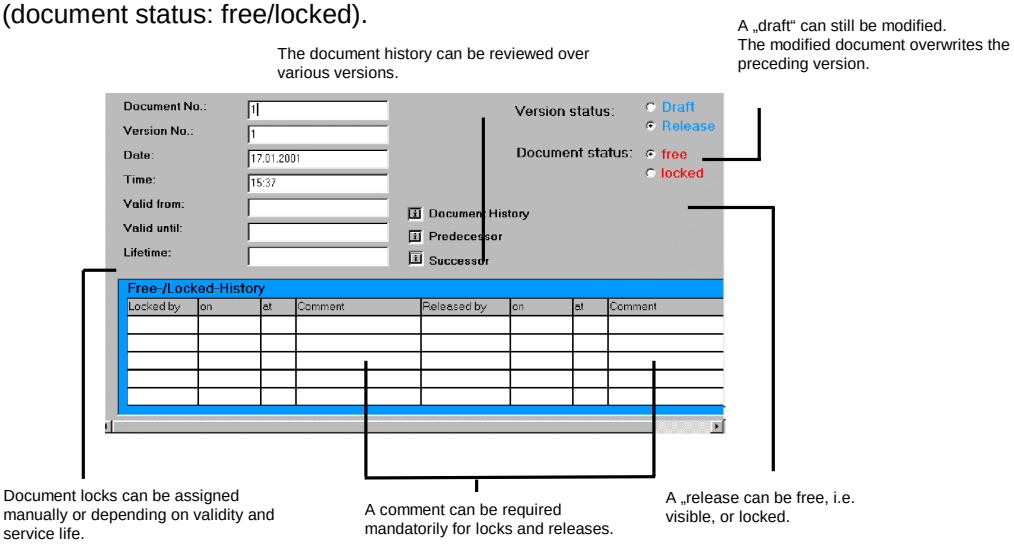
MORE INFORMATION ON THE TOPIC: 16 USER SET

17.4 Lock/release entire document

To be able to lock/release an entire document, the version management must be set up in the archive. This is only possible when an archive is created new. The fields required are automatically defined, if you activate "version management" in the Dr.Doc® assistant.

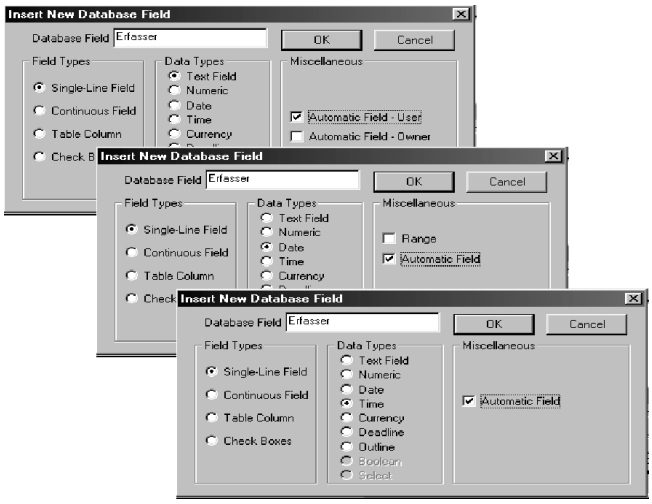


The document's status is then controlled in the application by activating the corresponding fields (document status: free/locked).


A „draft" can still be modified.
The modified document overwrites the preceding version.
The document history can be reviewed over various versions.
Document No.: 1
Version No.: 1
Date: 17.01.2001
Time: 15:37
Valid from:
Valid until:
Lifetime:
Version status: Draft Release
Document status: free locked
Document History
Predecessor
Successor
Free-/Locked-History
Locked by | on | at | Comment | Released by | on | at | Comment
Document locks can be assigned manually or depending on validity and service life.
A comment can be required mandatorily for locks and releases.
A „release can be free, i.e. visible, or locked.

17.5 Log new entry

➔ Author, date and time can be logged. The required fields are created as single fields with the corresponding option:



➔ Ensure that these fields definitely have an additional editing lock.
Procedure:
Activate the “group overview“ tab in the user manager in the left column and select the required user group or the required user.
Activate the “archive associations“ tab in the middle column. Select the required archive under “associated with“.
Now activate the “fields“ buttons. In the table you will see all fields, which you have created in this archive.
Select ‘the identifier for field rights or create a new identifier and allocate it to the corresponding fields.
Afterwards select the “rights“ tab in the user manager’s middle column. Select the “field rights“ button and the identifier used in “identifier for field rights“.
Determine the rights in “field rights“ under “permitted“.

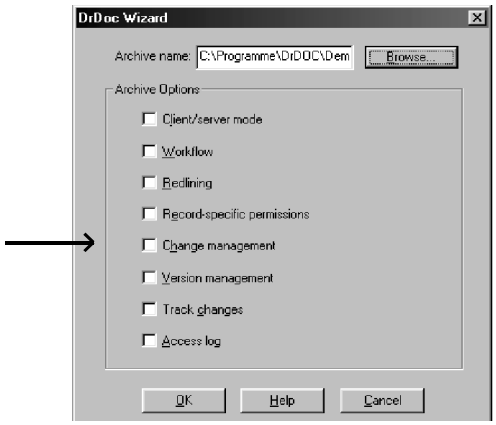
➔ Don’t forget to save your settings!

17.6 Log changes

▶ Log current user:

User, date and time can be logged as soon as the record is saved.
If only the last change is to be entered, the required fields must be created as single-line fields with the corresponding option (see above).
If all changes are to remain registered, the fields must not be single-line, but should be created as table fields and combined in a table on the mask.

This change management with the corresponding fields can be directly selected for new archives in the Dr.Doc® assistant.



Example

Änderungen

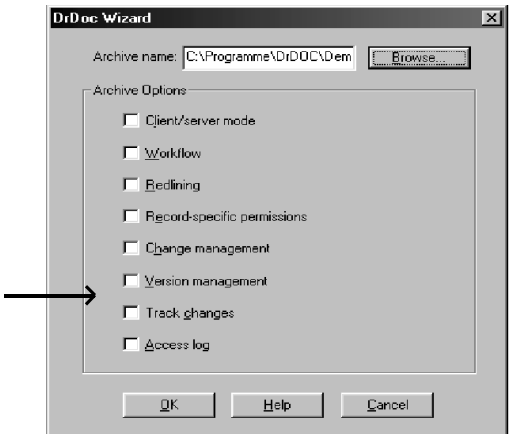
von	am	Uhrzeit
Müller	09.09.1997	12:49
Kunert	10.09.1997	14:23
Kunert	30.09.1997	15.48

▶ Log text changes:

To log changes of profile data, a change log must be created.

The change log function is activated

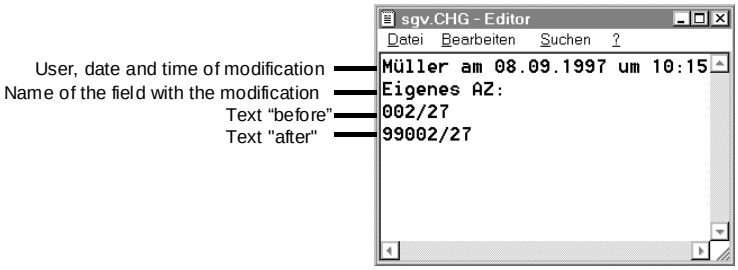
- either when creating a new entry in the Dr.Doc® assistant:



- or subsequently via "Management/edit archive parameters".

The change log is automatically updated in a file with the extension chg, which is placed in the directory, which is stated as path for archive files.
This file is read with an editor.

Example

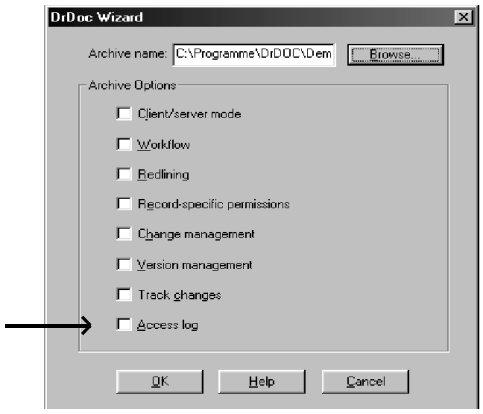


17.7 Log access errors

Logins with incorrect password can be logged with an access log.

The access log function is activated

- either when creating a new entry in the Dr.Doc® assistant:



- or subsequently via "Management/edit archive parameters".

The access log is automatically updated in a file with the extension acc, which is placed in the directory that is stated as path for archive files.

Example

Failed attempt to login as user “Kunert”

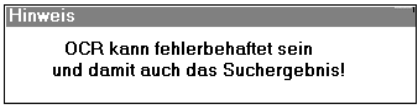
17.8 Create messages

Archive-specific messages with showing the time can be created

- for field search or template search
- for missing permission for the document view.

Example

OCR processed text is inserted in an individual field "OCR text". As it is not post-edited or checked, it is possible that a term you are looking for is not found, as it was recognized incorrectly.
The corresponding message should therefore appear, if a user carries out a field or template search in the "OCR text" field



The messages are created via an entry in the archive-specific ini file.

Call the *archivename*.ini file with an editor from the directory, which is stated as the path for help files (for C/S: \form). At the end of the file add to the column [MESSAGES] (case-sensitive!) and your specific messages according to the following pattern:

For messages when searching fields: *Field name=Message;display time in sec.*
For messages in Doc.View: Documents=*Message;display time in sec.*

Instead of *field name* enter the name of the field. For messages in document view Documents must be entered before the message.
A new line within the message is identified with \ (never create a paragraph within a message with the ENTER key!)

The message window will be hidden again after the time stated in seconds.

Example

```
[MESSAGES]
OCR text=Attention, OCR processing may contain errors!;5
Documents=Document not released\Ask Mr Miller!;10
```

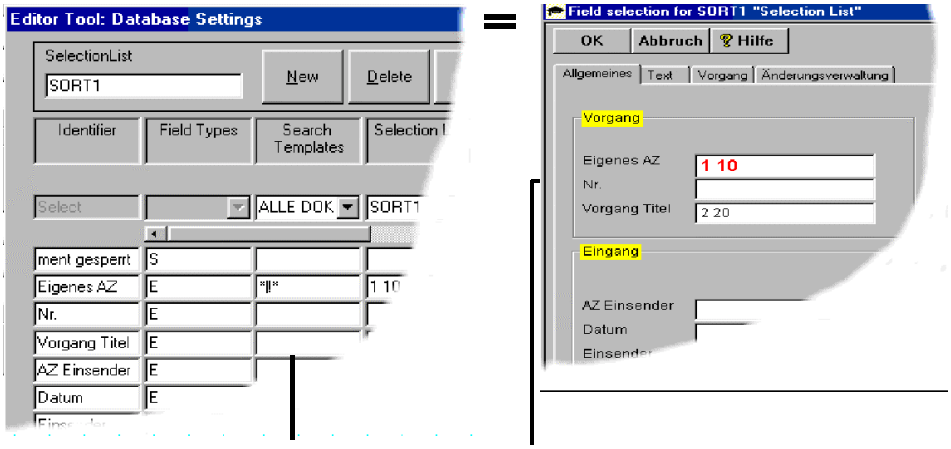
18. SETTINGS

All settings options described in the following can be found via these two options:

- the menu item "Settings/field selection for..."

or:

- in the menu item "Management/setup archive..." tab "Database settings".



In the database settings, tables are used for the settings. In addition, you are provided with an overview of all settings.

In the field selection, the settings are entered directly in the mask.

From within the tabular overview "Database settings" the current mask can be called with the "Edit" command for making entries. The cursor must be in the corresponding column. If no mask is currently set, the "Edit" command is not available.

Note

Entries in "Field selection for..." can of course only be made in the fields, which are available in the current mask.

Further settings for individual fields, which regulate access permission (e.g. edit lock(change), view etc.) are made via the user set.

18.1 Determine/ change entry criteria

The following entry criteria can be determined:

- Data types (numeric, alpha-numeric, date, currency)
- Automatic fields (user, date, time, number generator, file name)
- Calculation definition
- Mandatory field entry
- Maintain entries for new record
- Create key fields
- Input duplication check
- Data transfer archiving

18.1.1 Data types

Various data types can be assigned to individual fields.

Call "Settings/field selection for data type" or activate "data types" column in the "database settings".

➔ Enter:

S („String“) for string (alpha numeric)
U („User) for string (alphanumeric) is only used for workflow
Z for digit (numeric)
ZB for numeric range
D for date
DB for data range
W for currency
WB for currency range
G for outline
F for deadline
XD for date and time

Note

Only for the "image" field that always exists, a corresponding data type IMAGE is entered, which may not be changed.

18.1.1.1 Special features data type “date”

The following are allowed for the data type "date":
DD.MM.YY , DD.MM.YYYY , D.M.YY , D.M.YYYY or DDMMYY

The entry will always be automatically extended to DD.MM.YYYY

Example

Entry 100890 will be extended to 10.08.1990

As a new feature you can enter the century limit in the field selection for data types (D or DB).

“D 50“ = year < 50: next century / >= 50: current
“D 0“ = always current century
“D 100“ = always next century

Apart from the definition option per field, there is also the possibility to make definitions in archive.ini.

[AUTO_DATE]

DEFAULT=<year> =	Default for all fields, which have no definition in field selection
GLOBAL=<year> =	overwrites all other definitions

18.1.1.2 Special features data type “date and time”

A single-line field with this data type is initially created with the data type “date”. Via “Settings/field selection for../data types” it can subsequently be changed to “XD”.
This field can be filled automatically (via automatic field “D”) or manually via the context menu of the right mouse button and “date/time”.
In this way, the date and time can also be entered in fields with data type “S” (for “String”), e.g. continuous fields.

18.1.1.3 Special features data type “currency”

Entries in a currency field are automatically set to two places after the decimal point.

Example 45583 has been entered, the result is 45 583.00

Special features for text retrieval and "search fields" are in the corresponding chapters.

18.1.1.4 Special features range data types

The range data types ZB, DB and WB can include an entry like data types Z, D and W or a range. For the later search in these fields to run correctly, the marginal data must be entered separated by <-> . The entry in a range field is thus, e.g. 58<->456 or 02.06.1994<->05.07.1995

The search in these range fields will also find numbers or dates within this range.

Example

You are searching for 08.12.1994, you will also find the record, which includes the above range.

18.1.1.5 Special features data type “deadline”

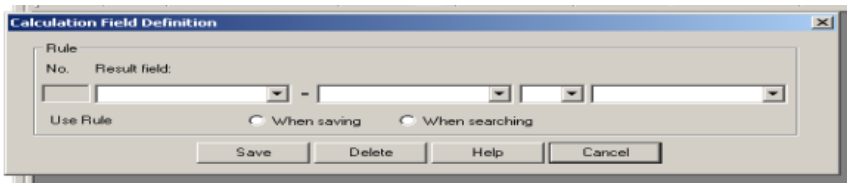
A deadline field is for calculating a date deadline, e.g. for blocked period, delays etc.
The entry in a deadline field takes place according to the pattern
Number[unit] , days (D), weeks (W), months (M) and years (Y) can be selected as unit.

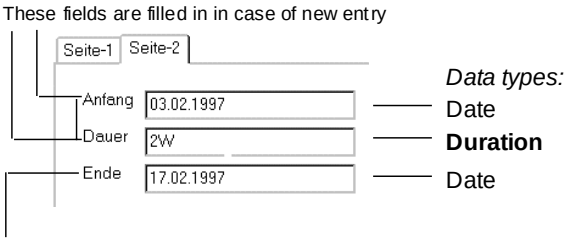
10T means: The date to be calculated is ten days after the related date.

To be able to carry out a deadline calculation, the deadline field itself, the date field with the respective date and the date field for the result date is necessary.

Example

With the following calculation definition the result of the deadline calculation when saving the record is entered in the "End" field:





After “Save”, the ersult of the calculation is entered here.

18.1.1.6 Special features data type “outline”

The data type outline refers to the subsequent sorting of data. The input as data type takes place according to the pattern:

G [alphanum./num.] [separator][alphanum./num.][separator] etc.

The options state the outline type.

Examples

Outline type	Input for data type
1.5.5.6	G Z.Z.Z.Z
A/a-1	G S/S-Z

It is possible to enter more outline levels in the field than stated here. But sorting will only be carried out up to the level defined as data type.

18.1.2 Automatic fields

Apart from the field selection for basic data types, there is also the option to have the program make automatic entries in selected fields.

Call "Settings/field selection for/automatic fields" or activate the "automatic fields" column in the "database settings".

➔ In the intended field, enter:

B	for user (i.e. the current user if using the user set)
D	for current date
T	for current time.
I	for owner (the current owner's name will be entered.)
N	for number generator (automatic numbering; see the following chapter 18.1.2.3!)
NV	for modifiable number generator (see the following chapter 18.1.2.4)
F	for file name (File) (the file name will be entered when archiving files).
V	for applying an entry from another field.

18.1.2.1 Special features automatic fields "user", "date" and "time"

The user name entered when logging in to the archive will be entered in the automatic field "user" when making a new entry or changing an entry.
The automatic fields date and time contain the respective current data of the computer.

Tip

Log all changes (Change management)

If you want to log all changes to a record (i.e.: as soon as "Save" is activated), set up a table and enter the automatic field identifications concerned. A new line is then automatically created after each change showing the last modified data.

18.1.2.2 Special features “Conditional automatic fields”

Conditional automatic fields are only filled, if other fields have an entry.
The names of the database fields are enclosed by “/“ and separated with blanks.

Example

B /field1 field2/
The automatic field “user“ is only entered, if there is an entry in field1 AND field2.

18.1.2.3 Special features automatic field “Number generator”

A number generator issues an individual number to each new record; the numbers of any deleted records are not re-issued.

Step by step

▶ Create:

➔ Call "Settings/field selection for/automatic fields".
Enter N in the required field and confirm with "OK".
Any records entered from now will be numbered.

➔ If records already exist and you want to number them:
Call "Management/number generator new".
Any existing records will be issued with a number in the field selected with N. Any existing entries in these fields will be overwritten.

C/S

If a number generator is created subsequently, the client parameters must first be called and confirmed at the server under "Management/edit archive parameter...” In addition, the program Dr.DOC® must be restarted at the clients for changes to apply.

▶ Terminate automatic numbering:

➔ Call "Settings/field selection for/automatic fields".
Delete N and confirm with "OK".

Any records entered subsequently will not be issued with a number.

Any already existing numbering will remain, but the field can now be edited (i.e. changes can be made).

Be aware that the field concerned is automatically identified with the data type Z (for numeric entries) when the number generator is created. This data type setting is maintained, even if you delete the automatic field for number generator again.

18.1.2.4 Special features automatic field "modifiable number - generator"

A modifiable number generator suggests an individual number for each new record; however, this number may be changed – in contrast to the number generator "N".
The numbers automatically continue in the suggested order, i.e. any change only refers to the record concerned and has no effect on any records entered subsequently.

Tip

If you do not want numbers to be issued twice, the field concerned should have an input duplication check.

Step by step

▶ Create:

➔ Call "Settings/field selection for automatic fields".
Enter NV in the required field and confirm with "OK".
Any records entered from now on will be issued with a number in the field concerned. This number can be changed.

C/S

If a modifiable number generator is subsequently created, the client parameters must first be called and confirmed at the server under "Management/edit archive parameter". In addition, Dr.DOC® must be restarted at the clients for changes to apply.

▶ Terminate numbering:

➔ Call "Settings/field selection for automatic fields".
Delete NV and confirm with "OK".
No numbers will be suggested for any records entered subsequently.

Be aware that the field concerned is automatically identified with the data type Z (for numeric entries) when the number generator is created. This data type setting is maintained, even if you delete the automatic field for number generator again.

18.1.2.5 Special features automatic field “file name”

The automatic field “file name“ is helpful, if old stock of files are now to be applied in Dr.DOC® per batch processing.
The complete file name with extension is applied.

18.1.2.6 Special features automatic field "automatic entry"

To automatically apply entries from one field (of the same archive and the same record) into another field, the following basic setting is required:

The field, into which the entry is to be applied, is identified according to the following pattern: V [field name]
Instead of [field name] enter the name of the field from which the entry is to be applied.

The "destination field" (= automatic field) is only filled automatically, if it does not contain another entry.

Note

Special feature in table columns as automatic field V: a new line is created, if an entry does already exist!
If the "destination field" is always to be filled automatically and any existing entry is to be overwritten, identify the field as VU [field name]

Instead of [field name] enter the name of the field from which the entry is to be applied.

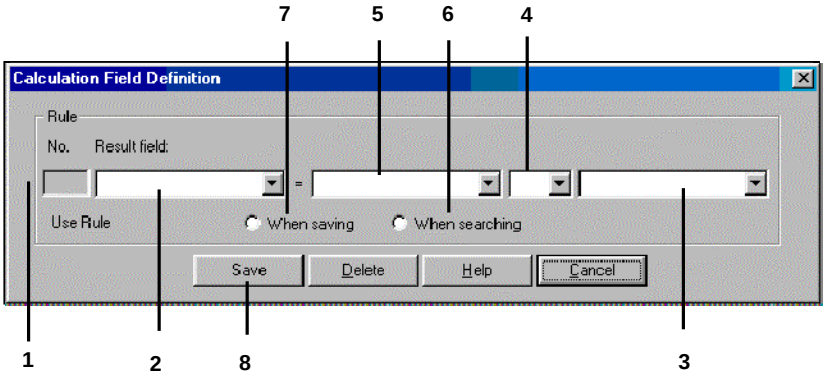
Example

In a document management the document's author is always to be entered for new documents as the first reproduction as standard. For this purpose the field "reproduce" is defined as an automatic field with the entry V Author. When a new entry is made, the "reproduce" field will be filled with the entry of the author field (on saving).

18.1.3 Calculation definition

Fields, which carry out a calculation with entries of other fields and automatically enter the result, can be defined. The calculation is carried out automatically when making a new entry, as soon as "Save" is activated.

Call "Settings/calculation definition".



1: The program automatically numbers an archive's calculation definitions.
2: Select the field for entering the result from the list box.

Important

A date field can only be used as a result field for a deadline calculation.

3-5: Select the first calculation field, the operator and the second calculation field from the respective list box.
6+7: Determine when the calculation is to be carried out.
8: Save the calculation definition here.

Repeat steps 2-8 for all calculation definitions you want to create. When you have defined all calculations, terminate the dialog with "OK".

Example

The above definition means principally: The sum from the “start” and “duration” fields is to be entered in the “end” field. These can be in numeric or currency format. A deadline calculation is possible, if the “start” and “end” fields are defined as date fields and the “duration” field is a deadline field.

MORE INFORMATION ON THE TOPIC:
- 18.1.1.5 SPECIAL FEATURES DATA TYPE “DEADLINE”

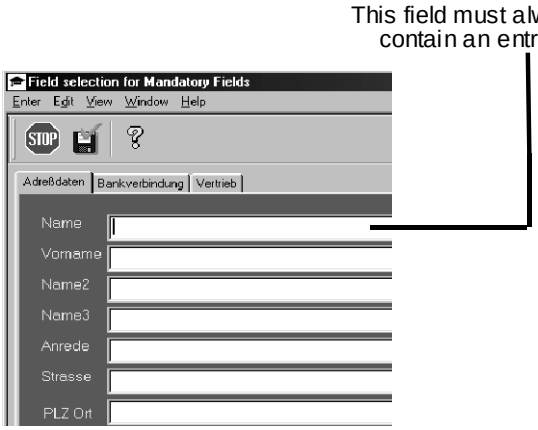
18.1.4 Mandatory field entry (Mandatory fields)

If a field always has to have an entry (e.g. a reference entry in document management) no entry will be made in such a field on entering a new record or if the entry is deleted when changes are made, there will be an error message.

➔ Call "Settings/field selection for/mandatory fields" or activate the “mandatory fields” columns in "database settings".

Enter any character in the required fields (or for continuous fields at the start) and confirm with "OK".

Example



18.1.5 Key fields / create index

The key management facilitates quick access in field-oriented searches of certain entries in records; any fields can be determined for this index.

For your information: Dr.DOC® does not require reorganisation runs or similar for an index.

➔ Call "Settings/field selection for/key fields" or activate the "key fields" column in "database settings"
There are three types of keys:

- Multiple key (MK):
  A term may appear any number of times in this key field
- Duplication key (DK):
  A term may appear any number of times in this key field. As soon as two records have the same entry in this key field, the program searches other fields preset by the user when making a new entry to establish whether there are corresponding entries here, too. If so, an error message will appear.
- Single key (SK):
  This is the stictest preset for key fields: A term may only appear in one record in this key field.

Enter the corresponding abbreviation in the required fields: MK, DK or SK.

Tip

Restrict key entries

It makes sense to restrict the key entry to a maximum length by stating the number of characters after the abbreviation, e.g.: MS 25 only uses the first 25 characters of the field entry for generating keys.
This saves space!

Tip

Key setup for large data quantities

We recommend you have the operating system cache as large as possible for large quantities of data to set up the key (only for this purpose!) (e.g. for 8MB RAM: operating system cache 4MB). This speeds up the key setup.

An index can be deleted, changed or newly generated at any time, if there is no other user in this archive. But be aware that no single or duplication key check will take place, when the key is set up subsequently. These checks will only become active in existing records, when you want to edit them again.

18.1.6 Input duplication check

This duplication check is only possible in connection with a duplication key (see previous section).

As soon as two records have the same entry in this key field, the program searches other fields preset by the user when making a new entry to establish whether there are corresponding entries here, too. If so, an error message will appear.

➔ Call "Settings/field selection for input duplication check" or activate the "input duplicates" column in the "database settings".

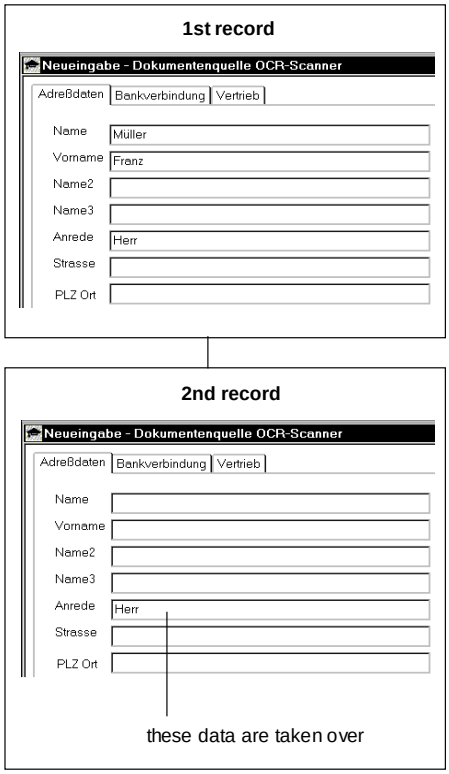
Number the required fields and confirm with "OK".

18.1.7 Maintain field entries for new input

After saving a record the entries in the screen view of the individual fields are deleted or they can be maintained – subject to the archive setup. If the content is not deleted, you can change and overwrite your data with the overwrite mode for the following record. This is particularly convenient for records, which only differ slightly.
In addition, individual fields, in which the entry is to be kept, can also be selected.
You can save various configurations.

➔ Call "Settings/field selection for/maintain field entry" or activate the "maintain field entries" column in "database settings".
Enter new configuration name or select existing one and "edit".
Enter any character in the required fields and confirm with "OK".

Example



To use an existing configuration, call menu item, select entry and confirm with "OK".

Note

This setting is user-specific, which means, every user can determine his/her own configurations. In addition, the system administrator can also define general settings, which anybody may use, but only the PUBLIC user may change.
So if you want to set up general configurations, register as PUBLIC user in the archive and then define the settings.

MORE INFORMATION ON THE PUBLIC USER IS INCLUDED IN CHAPTER:

- 16 USER SET

18.1.8 Field default

User-specific field defaults can be defined under “Settings/field selection for/field default“. This setting must be defined once, for every user separately.

18.1.9 Data transfer-archiving

You have the option of automatically transferring certain field entries from an archive (e.g. the company name from an address) into the associated archive for archiving the text after the data transfer (e.g. to word processing).

➔ Call "Settings/field selection for data transfer archiving" or activate the "data transfer archiving " column in "database settings".

Enter the field name of the archive, into which the data is to be imported, in the field from which the data is to be applied. The name of the archive is not stated here; the archive, which was stated in the archive parameters as "automatic archiving after TD", will be called up.

MORE INFORMATION ON THE TOPICE IS INCLUDED IN CHAPTER:

- 14.7 EDIT ARCHIVE PARAMETERS

18.2 Determine / change output criteria

The following criteria can be determined for the data output:

- Search templates
- Details in select lists
- Column headings
- Sorting
- Selection for printing tables
- Output duplication check
- Hypersearch configurations

Note

The settings for search templates, select lists, sorting and output duplication check are user-specific, that means every user can determine his/her own settings. In addition, the system administrator can also create general settings, which anybody may use, but which only the PUBLIC user can change.
If you want to define general settings, register in the archive as PUBLIC user and then define the settings.

MORE INFORMATION ON THE USER PUBLIC IS INCLUDED IN CHAPTER:

- 16 USER SET

18.2.1 Define search templates

Certain search queries are required again and again. In such cases it is much simpler, if you save the search query as a template under a unique name.
All associated output parameters (e.g. select list, sorting) must then be assigned to this search template.

- ➔ Call "Settings/field selection for/search templates" or "Database/field search with template".
- ➔ Enter new template name and click "Edit".
- ➔ Now enter your search terms as for a normal field search. Confirm with "OK".
- ➔ Under “Settings/template search“ the output parameters (select list, sorting, etc.) are allocated and applied with “Save“.

To use an existing search template, call "Database/field search with template", select entry and start the search with "OK".

Tip

General search templates

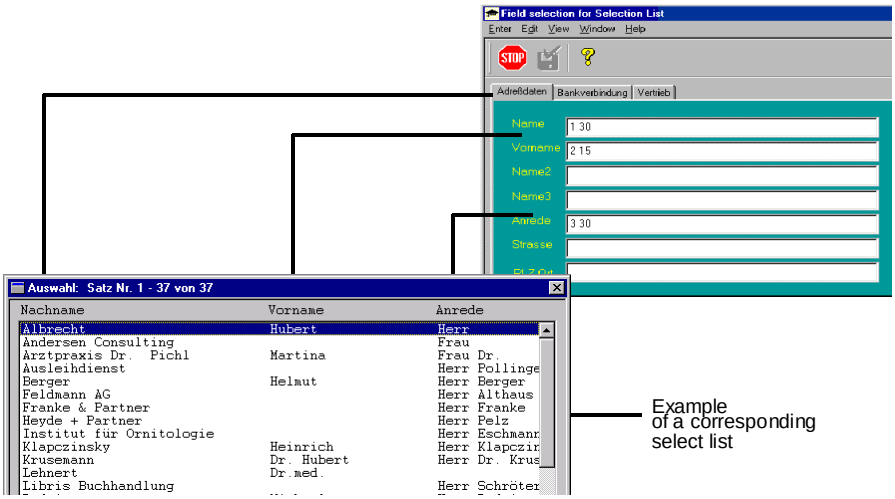
It might be useful to save search templates, which are frequently required by all users, as general search template, e.g. "Find all records of the archive" etc. Register as PUBLIC user for this purpose and follow the steps stated above.

18.2.2 Details in the select list

➔ Call "Settings/field selection for/select list".
Enter new configuration name or select existing one and "Edit".
Or: activate "select list" column in "database settings", enter new name, apply with "new" and then "edit" or enter directly.

➔ Number the fields to be listed on the select list. Determine the column width stating a number of characters after a blank behind the number. The number of characters is restricted to 253 characters. The list can be scrolled from approx. 80 characters.

Example



In the example, the name, first name and address fields are defined as columns for the select list with the corresponding width. The headings for the select list are entered under "Field selection for headings".

To use an existing configuration, call menu item, select entry and confirm with "OK".

Note

If you select a table column for the select list and there are several lines with entries, these entries are all (within the column width) displayed separated by a comma.

Tip

General select lists

It may be useful to save standard select lists, which are often required by all users, as general a configuration. Register as PUBLIC user for this purpose and follow the steps stated above.

18.2.3 Headings for columns

When printing records in the form of columns, there is a heading above the columns. You can choose the wording of these headings as you wish.

➔ Call "Settings/field selection for column headings" or activate the "headings" column in the "database settings".

Enter the required headings in the individual fields and confirm with "OK".

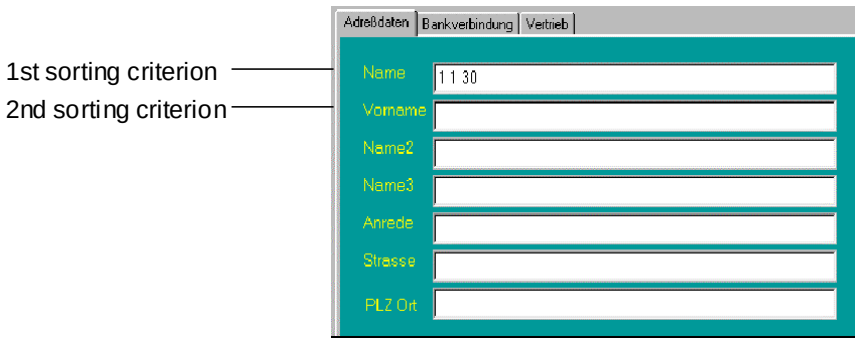
18.2.4 Sorting

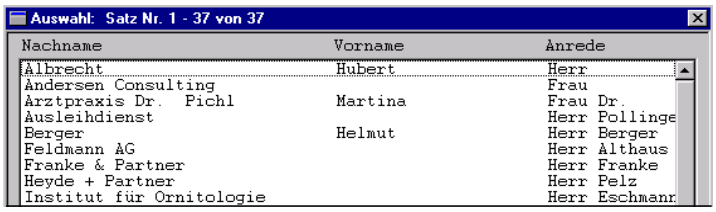
➔ Call "Settings/field selection for sorting".
Enter new configuration name or select existing one and "edit".
Or: activate "sort" column in "database settings", enter new name, apply with "new" and then "edit" or enter directly.

➔ Number the fields to be sorted. Optionally, enter the number of characters according to which data is to be sorted after a blank behind the number (if there is no number entered here, sorting will be according to the field's entire number of characters.)

The illustration shows an example of sorting data.

Example





The found records are listed alphabetically on names and forenames

To use an existing configuration, call menu item, select entry and confirm with "OK".

Be aware, the number of fields to be sorted, which is stated here, and the number of sorting characters influences the memory requirement and the speed of the search.

Tip

General sorting

It may be useful to save standard sorting of data, which is often required by all users, as a general configuration. Register as PUBLIC user for this purpose and follow the steps stated above.

18.2.5 Selection for printing tables

➔ Call "Settings/field selection for printing tables".
Enter new configuration name or select existing one and "edit".
Or: activate "print tables" column in "database settings", enter new name, apply with "new" and then "edit" or enter directly.

➔ Number the fields whose contents are to be printed and enter the number of characters for the column width after a blank. If you do not enter a number, the field's entire number of characters will be printed.
Remember the number of characters is restricted to 253 with Dr.DOC® automatically adding one character for each field selected to separate the columns, i.e. this would be 62 characters in our example.

18.2.6 Print tabs

If you want to print tabs as they appear on screen, call the “print” command on the select list after a search.

You can either print all tabs, the current tab or certain tabs (e.g.: *1-2*). You always have to select the relevant setting each time.

MORE INFORMATION ON THE TOPIC IS INCLUDED IN THE CHAPTER:

- 13.3.2 PRINT PROFILE DATA

18.2.7 Output duplication check

Dr.DOC® can carry out an optional duplication check for the search to prevent the output of duplicates on the select list. An example: an address management contains several records with different contact partners for one company address. On a select list each company is to appear only once.

➔ Call "Settings/field selection for output duplication check".
Enter new configuration name or select existing one and "edit".
Or: activate "output duplicates" column in "database settings", enter new name, apply with "new" and then "edit" or enter directly.

➔ Number the required fields and confirm with "OK".

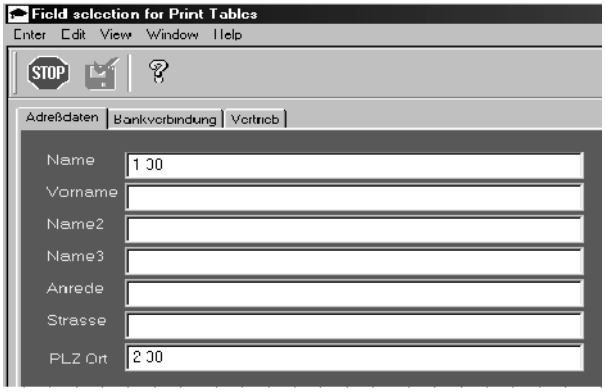
To use an existing configuration, call the menu item, select entry and confirm with "OK" (icon “duplication check” must be active).

Tip

General output duplication checks

It may be useful to save standard output duplication checks, which are often required by all users, as a general configuration. Register as PUBLIC user for this purpose and follow the steps stated above.

Example



To use an existing configuration, call the menu item, select entry and confirm with "OK".

Note

If you determine a table for Print Tables, the entries of several lines are all entered underneath each other in the table.

Tip

General print table definitions

It may be useful to save standard table definitions, which are often required by all users as general configuration. Register as PUBLIC user for this purpose and follow the steps stated above.

MORE INFORMATION ON THE TOPIC IS INCLUDED IN CHAPTER:

- 13.3.2 PRINT PROFILE DATA

18.2.8 Define hypersearch

18.2.8.1 Create search

A hypersearch automatically starts the basic searches in accordance with a previously determined definition either within an archive or across-archives, after the search actively selected by the user. In addition, a "loop" option can be selected, i.e. the search will continue until no further hits are found (recourse).
The definition of a hyper search may be simple or very complex, subject to requirements.

Step by step

① ▶ Consideration:

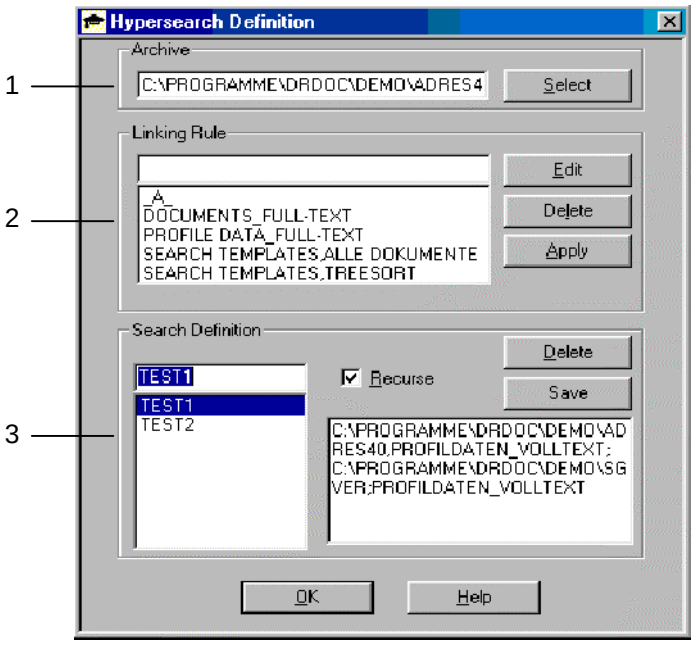
Consider in advance what you want to find in which archives. There are two basic options:

- A term or several logically connected terms are searched for in several archives with text retrieval in profile data and/or CI documents.

- A term and one or several associated terms are searched for in one or several archives. A recourse search is also possible here (i.e. "loop").

② ▶ Select archive:

Call "Settings/hyper search..."



➔ Activate the "select" command under "archive" (1)

➔ Select the name of the archive, which is to be included in the hyper search.
Confirm the selection with "OK".

③ ▶ Linking rule:

- Predefined:
  Under "linking rule" (2) you can automatically select predefined text retrieval or search template searches and continue with “apply linking rules”. The options “Profile data_text”, “Documents_text” and “Search templates,...“ are already displayed as standard.

- Manual definition:

Please be aware that predefined options are not possible in connection with manually defined links.
That means: you can either only carry out profile data and/or document text retrieval (with the options already mentioned) in all the stated archives or different searches (including global and text retrieval!) in all the stated archives, but these will have to be manually defined.

➔ The profile data and document text options will find one term or a logic link of several terms across all archives only in profile data or documents.

➔ The defined link option finds a term and one or several related terms in one or several archives in a different way.
Enter a name for the definition and then select "edit".

The input form of the selected archive will be shown. Now enter the search rule in a defined field. That means: the term, which is displayed by the record found in this field, will be used for the next search. You determine the way this next search is carried out according to the following pattern:

[Path\archive name],[search type],[identical or non-identical entry]

[Path\archive name]: the path and the name of the archive, in which the next search with the field entry found here is to be carried out.

[Search type]: Profile data text or field search.
For profile data text search enter G; for field search enter F and behind it the name of the field to be searched, e.g.: Fsurname
Ensure that there is no blank or other character between F and the field name.

[Identical or non-identical entry]: The entry found in this definition field is used for the next search. Here, you enter whether the same entry or anything but this entry is to be found in this next search. The input for identical entry is: = =

for non-identical entry: !=
There must be no blank between the two characters.
Confirm the entry with "OK".

Examples

c:\drdoc\address,Fsurname,==
Means: a field search, which finds all records that have the same entry as the one found in the definition field, is to be carried out in the local address archive in the surname field.

<Hostname>/<Port number>/<Archive name>,G,!=
Means: a profile data text search, which finds all records that do not include the entry of the definition field, is to be carried out in the C/S project archive.

④ ▶ Apply linking rule:

➔ Activate the "apply" command. The link stated will be entered in "Search definition" (3) in the definition view.

⑤ ▶ Define more searches:

➔ Repeat steps 1-3 until all the searches you require have been defined.

⑥ ▶ Save search definition:

➔ When you have defined all searches, save the entire configuration in "Search definition".
Enter a new name above the list box and activate the "Save" command.

18.2.8.2 Change search definition

Step by step

① ▶ Select search definition:

➔ Select the configuration you want to change in the "search definition" column.

② ▶ Change:

➔ You will see the individual defined search queries in the definition view. You can select and delete a search query directly on this list.

➔ If you want to add a new search, proceed as described in the previous chapter.

➔ If you want to delete a defined link rule, select the name in the "link rule" column and activate the "delete" command.
This only deletes the rule – to delete it from the configuration, proceed as described above.

③ ▶ Save search definition:

➔ When you have made all the required changes, save the entire configuration in the "search definition" column.

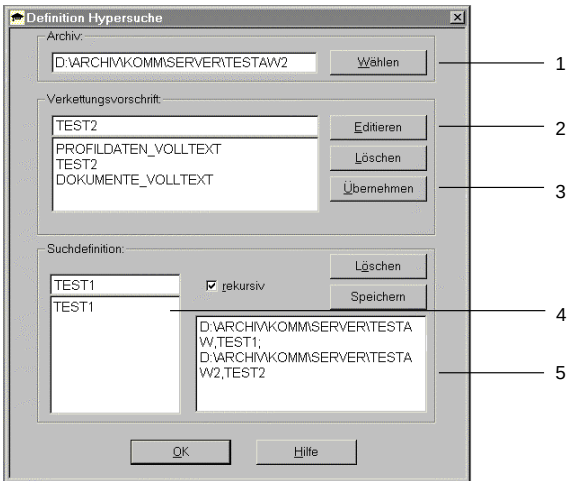
Note

The option "recurse" will not be saved, but can be changed from case to case.

Example

Required search flow:
All records with the entry "test" in the field "distributor to do" (profile data text retrieval or field search) are to be found in the testaw archive. For all hits from testaw, archive testaw2 is also to be searched for "test". For all hits from testaw2, archive testaw3 is also to be searched for "test".

A. Hyper search definition:
Call "Settings/hypersearch:search definitions" in the testaw archive.



- Create link from testaw to testaw2:

1: Select start archive for across-archive search: archive testaw

2: Name link rule and click on "edit" button: enter the follow-on archive, the search type, profile data_text (G) and check for identical entries (==) in the "field selection for link" window in the "distributor to do" field:
Path\testaw2.da,G,==
Close "field selection for link" window with "OK".

3: Click "apply" in the "definition hyper search" window. The subsequent archive testaw2 is then applied in the edit field (5).

- Create link from testaw2 to testaw3:

1: Select start archive for the next across-archive search: archive testaw2

2: Name link rule and click "edit" button: enter the archive to be searched after testaw2 in the "field selection for link" window in the "distributor to do" field
Path\testaw3.da,G,==
Close "field selection for link" window with "OK".

3: Click "apply" in the "hyper search definition" window. The subsequent archive testaw3 will be applied in the edit field (5).

- Save search definition:

4: Enter name for the search definition and save this definition with "Save".

B. Define selection lists:
Select the fields of the archives to be listed on the selection list after starting the hyper search under "Settings/hyper search/select lists".

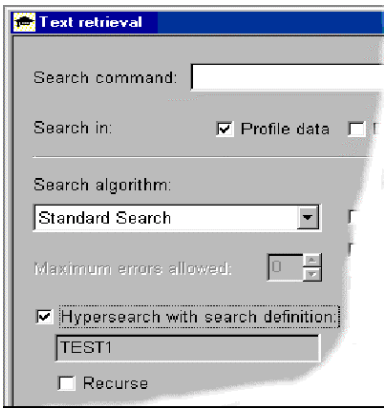
C. Carry out hyper search:

(See fig. on next page)

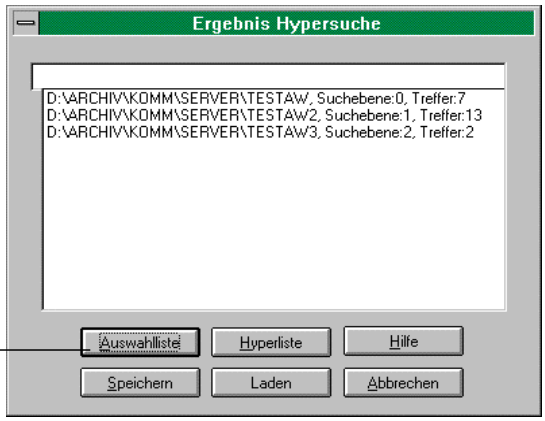
Note

If you want to carry out the hyper search with a different search to the one stated in the dialog field of the text retrieval or if you change the archive, you have to click on the required search under “Settings/hyper search/search” and confirm with “OK”.

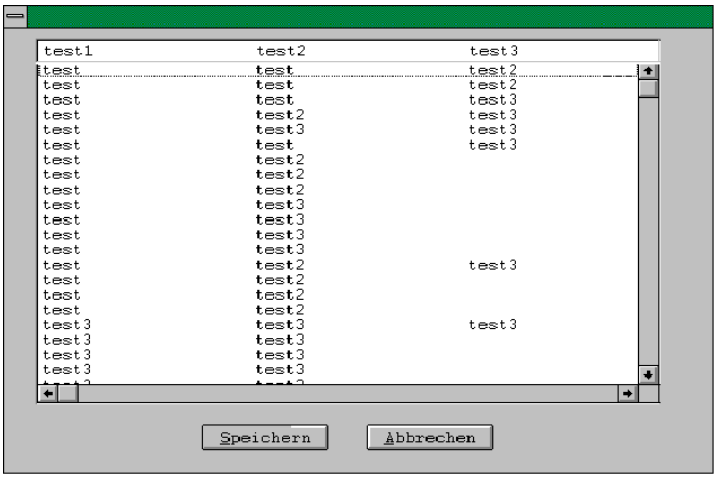
Start with text retrieval in testaw



Result display with number of matches



Select list with selected data from all three archives



18.3 Prepare data transfer to third party application

In principle, a connection with any program that has a macro language is possible. Dr.DOC® has macros for connecting to Microsoft WORD for WINDOWS 6.0/7.0 and 8.0 (Office 97) as standard. The following details refer to this link.

To transfer data without any problems, some preparation is required. Observe the following steps .

The program requires:

- The **Macro** DrDocTv, which automatically imports the data into the required file.
- A **temporary file** letter.txt, into which the respective selected word processing template is transferred.
- The **data source** data.txt, into which the data from the archive is initially transferred into the word processing program.
- The **control record** (always name control.txt)containing the names of the fields to be imported (see note!),
- The **templates** (letter, transfer form etc.) in the word processing program

When the archive was set up, a path for data transfer templates was entered in the path information. This path must include all files stated above, which are supplied with the program except for the forms to be created individually by the user.

In addition, a local work directory was entered, when the archive was set up. To ensure correct creation of the first forms in the word processing program, copy the files stated above with the extension txt into this local directory.

18.3.1 Winword preparations

Step by step

① ▶ Install macro:

Dr.DOC® creates the individual and standard texts with a WinWord macro. This **macro** called "DrDocTv" is supplied with Dr.DOC® and must be set up in Win-Word's global template file. For this purpose, call the (supplied) file drdocmac.doc in WinWord, which was copied into the Winword directory (standard: c:\winword) when the program was installed.
Follow the instructions within this file. The macro is predefined as standard for the path C:\DRDOC\TMP. If this path does not correspond to the local directory you selected, the macro must be changed according to the instructions.

② ▶ In Winword: create control record:

When the data transfer is started, the program looks for a control record called control.txt in the path for word files and copies this file into the local directory. If different archives exist (e.g. one address management and one literature archive), various application-specific control records must be available. To be able to work with the correct control record, the following options are available:

- A separate path for DATA TRANSFER templates is entered for each archive (e.g. for the address management C:\WINWORD\ADDRESS and for the literature archive C:\WINWORD\LIT). The respective directory must always include the files associated with the particular archive. The control record is always called control.txt in this case.

Or:

- The control records of different archives have different names (e.g. for the address management control.txt and for the literature archive conlit.txt). The path for DATA TRANSFER templates can be same for all archives in this case. But you have to ensure that all the required control files are copied into the local work directory and are available prior to creating forms.

➔ Call WinWord and create the control record. The field names of the archive in this file are in the selection and order as stated in the archive. Save this file in the directory, which is named in the archive as path for TV templates and in the directory, which is named as the local work directory.

➔ Create one common control record for an archive's template (e.g. for the address management) containing the field names of all templates. But you have to ensure that the order of the field names correspond with the sequence of the field selection in the archive.
A control record could be structured in the following way to apply to letter as well as transfer form:
name1→name2→name3→street→town→address→bank→bank sort code→ accno

③ ▶ Select fields in the archive:

Dr.DOC® needs to know from which record fields the entries are to be applied into wordprocessing. This can be defined by the user and can also be changed at any time (a change to this selection is for example necessary, if you have made changes in your control file).

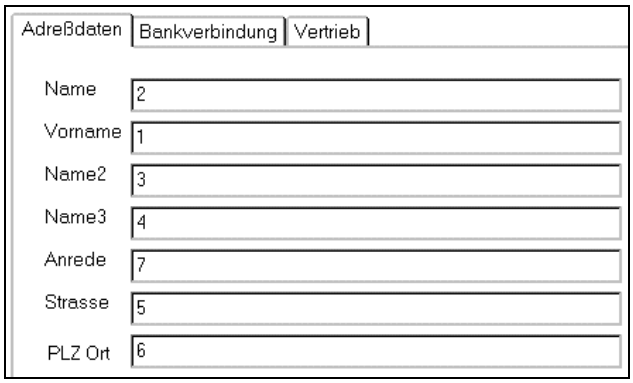
Call "Settings/field selection for transferring data".

➔ It is possible to create several configurations, but it is usually better, if you determine the selection for all forms together. Ensure that you keep to the order of your entries in the control record. The first field name of the control record must be entered as the first field etc.

Example

An example of the control record

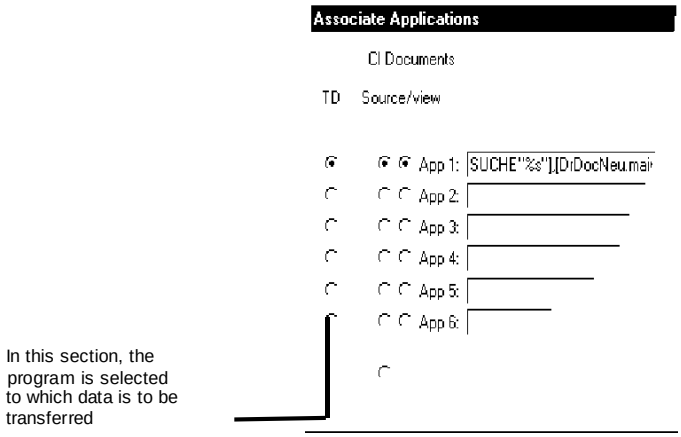
firstname→name→name2→name3→street→postcodetown→address



Note When you determine a table column for the data transfer, the entries of several fields are all applied separated by a block end character.

④ ▶ Determine program for transferring data:

➔ Call "Settings/Doc.association" in the archive.



A macro for this program must be available.

➔ Confirm the selection with "OK".

⑤ ▶ In WinWord: create text template (form):

- ➔ Call new document.
- ➔ Select "Extras/standard print-create main document".
- ➔ Attach as data source data.txt with path or as control record control.txt with path. Attention: the path must be the one stated in the database as local work directory!
- ➔ Create fields (the easiest way is stated, but there are also other possibilities).
- ➔ Go to required place in the document, select the "insert data field" command and select the required field from the list box.
- ➔ If required: individual pages from archived documents can also be applied. To enable this without errors, the template must have a variable for the graphics to be imported: **Graphics**
  Insert this variable manually at the required position in the template (in exactly this form).
- ➔ Once everything is as required, save the text.

Example

MUSTER GmbH

{SERIENDRUCKFELD vorname} {SERIENDRUCKFELD name1}
{SERIENDRUCKFELD name2}
{SERIENDRUCKFELD name3}
{SERIENDRUCKFELD straße}
{SERIENDRUCKFELD ort}

Sehr geehrte(r) {SERIENDRUCKFELD anrede},

Mit freundlichen Grüßen
Muster GmbH

You now have made all the necessary preparations and are ready to start with the data transfer.

Notes

Working in the network

- For working within the network, the files listed under 1 above must be available in a central directory (network drive) . Any changes to the files are only made in this central directory.
- To avoid errors when creating forms, the data.txt files and the control record file (always named control.txt) should be copied into the local work directory prior to creating the forms.
- IMPORTANT: the path information in the macro DrDocTv must correspond to this local work directory. If this is not the case, re-install the macro again, please!

Tip

Changing the macro

The macro, which runs within WinWord to import data, can of course also be changed. But it must always contain the routines described in the following chapter. In addition, you could for example determine that the new document is printed straight away.

18.3.2 Transferring data to other programs

If you want to transfer data to a third party application, this program must have a macro language and a standard text function.
To transfer data and to automatically import into the standard form, create a **macro.** This must contain the following basic steps:

1. If *archive.ext* is available in the local work directory or this file is open: close and delete the file.

2. Load the *data.txt* file from the local work directory, convert from ASCII into the program's format.

3. Load the *letter.txt*. file from the local work directory

4. Start the standard text function with *data.txt* and associated control record (see above) from the local work directory.

5. Find ***graphics***

6. Delete ***graphics*** and insert in its place, if available, the *data.bmp* file from the local work directory.

7. Save standard text in the local work directory as *archive.ext*.

8. Close *data.txt* and *letter.txt*.

Instead of *ext* use the program's standard extension for the *archive.ext*. file name

You require the relevant **templates**, which have been set up to import the data from the *data.txt* file in the local work directory, for the standard text function.

Note

The data exported from Dr.DOC® in data.txt is partly given new separators compared to the buffer within Dr.DOC®:

Separator	**Dr.DOC®-internal**	**data.txt for TD**
Field	9	9
Record	14	13 10
Table line	1	20
Continuous field paragraph	13 10	11

Tip

You find tips and information using WinWord as an example in the previous chapter.

18.4 Archive-specific program settings in Dr.DOC

"View" and “Find” settings used to be desktop-specific, but are now archive/desktop-specific by default.
The following settings can be controlled via archive.ini entry to establish whether they are saved archive or desktop-specific.

[ARCHIVE_SPECIFIC]

DOCUMENT_PREVIEW=1	= display small image automatically
DOCUMENT_DISPLAY=1	= display large image automatically
DOCUMENT_FOREGROUND=1	= display large image in foreground
DOCUMENT_SCALETOGRAY=1	= Grey scale for black/white images
DOCUMENT_ImageView_View=1	= Adjust large image to window size, to window width, to window height, 100%, user-defined
DOCUMENT_ZOOMFACTOR=1	= Zoom factor (large image user-defined)
DOCUMENT_INTERPOLATION=1	= Interpolation (large image user-defined)
DOCUMENT_REDLINING=0	= Redlining
WINDOWSETTINGS_Toolbar=0	= Toolbar
WINDOWSETTINGS_Statusbar=0	= Statusbar
WINDOWSETTINGS_MaximizeMDI=0	= maximize MDI
WINDOWSETTINGS_Inputposition=0	= keep input position
Searchsettings_Duplicates=0	= Duplication check (find)
Searchsettings_Case=0	= Match case
Searchsettings_Hypersearch=0	= Hypersearch

19. CREATE THESAURUS

To facilitate the input of field entries, e.g. hierarchical orders, and to guarantee that these entries are consistent, you have the option to apply entries from another archive with the "edit/call Thesaurus" command in new entry or edit mode, .
Important: Any archive can be used as Thesaurus archive.

Examples

Reference archive:
You have a reference archive containing all the bibliographic information. To input magazines with publishers and locations you have created a Thesaurus containing a record with the "fixed data", i.e. name, publisher, location for every magazine. Via the "Thesaurus" command these entries will be applied into the destination archive, the reference archive in this case.

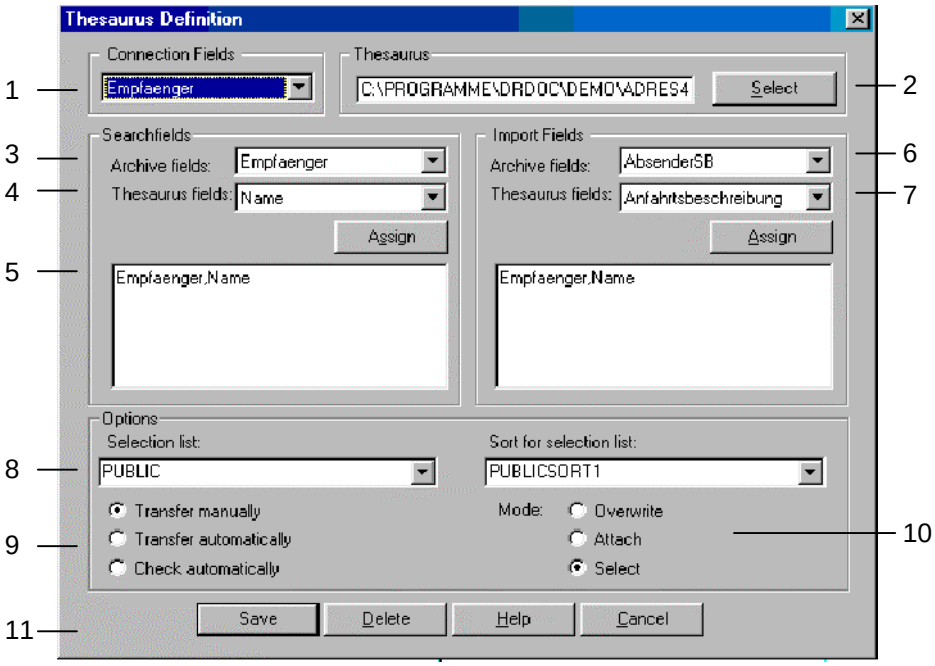
Receipt of invoice:
All incoming invoices are scanned into an incoming invoice archive. The name of the person rendering the invoice is not entered manually, but applied from an address archive containing the complete address and other data of the supplier. This also guarantees that the name is always spelt identically.

The basic prerequisite for this is that

- another archive exists, which is used as Thesaurus
- a link to a certain field of the Thesaurus is entered
- you select the field and entries of the Thesaurus to be applied.

Connect Thesaurus:

Go to the dialog for connecting the Thesaurus with the current archive (in the current archive) via “Settings/Thesaurus ...”.



1: Shows the field names of the current archive. Select the field, in which the Thesaurus is to be linked (i.e.: the Thesaurus will be launched from this field) from the list.

2: Select the archive to be linked with this field.

3+4: “Search fields:”
Connect the selected Thesaurus field (is shown as standard) as the first “archive field”. In addition, further fields can be connected (AND-connection). “Archive fields” shows the field names of the current archive and “Thesaurus fields” shows the field names of the Thesaurus archive. Select the link fields from the respective lists.

5: After clicking on “Assign”, the selection you made will be entered here. Any further allocations are separated by “ ; “ (semicolon). If you delete an allocation, ensure that you also delete the semicolon (“ ; “).

6+7: “Import fields:”

Any entries can be applied from the Thesaurus archive. Select the destination field (the field, into which the entry is to be applied) and then the source field (the Thesaurus field from which the entry is applied).
State each field combination separately and confirm with "assign".

8: Sorting and the selection list of the Thesaurus archive can be selected separately and may be different for each connection. This is especially useful, if an archive is used for several completely different Thesaurus adoptions. The configurations, which were created directly in the Thesaurus archive, are available.

9: Meaning of the various definitions:
Apply manually: The entry from the Thesaurus archive is done "manually", i.e. using the mouse to click on the "T" button in the connection field (or menu "edit/call Thesaurus"). If more than one matching record is found in the Thesaurus archive, the user will see a selection list, from which the required entry can be applied.
Apply automatically: On saving the record, an automatic check determines whether a record with a matching entry exists in the connection field in the Thesaurus archive. If so, the record may be saved. Otherwise the messages: "No Thesaurus entry for field ... found" and "Entries in the record do not correspond to Thesaurus definitions" will appear.
Automatic check: On saving the record, the field contents in the calling archive's connection field is compared to the Thesaurus archive's connection field. Only if the Thesaurus archive has at least one record with identical entry, the record can be saved. This guarantees consistent data management and prevents the input of incorrect data.

10: If "apply manually" is activated, different modes can be selected:
Overwrite: The Thesaurus entry found overwrites the search entry without displaying a selection list.
Attach: The Thesaurus entry found is attached to the existing entry without displaying a selection list.
Select: A selection list is always shown.

11: Save the Thesaurus definition with "Save".

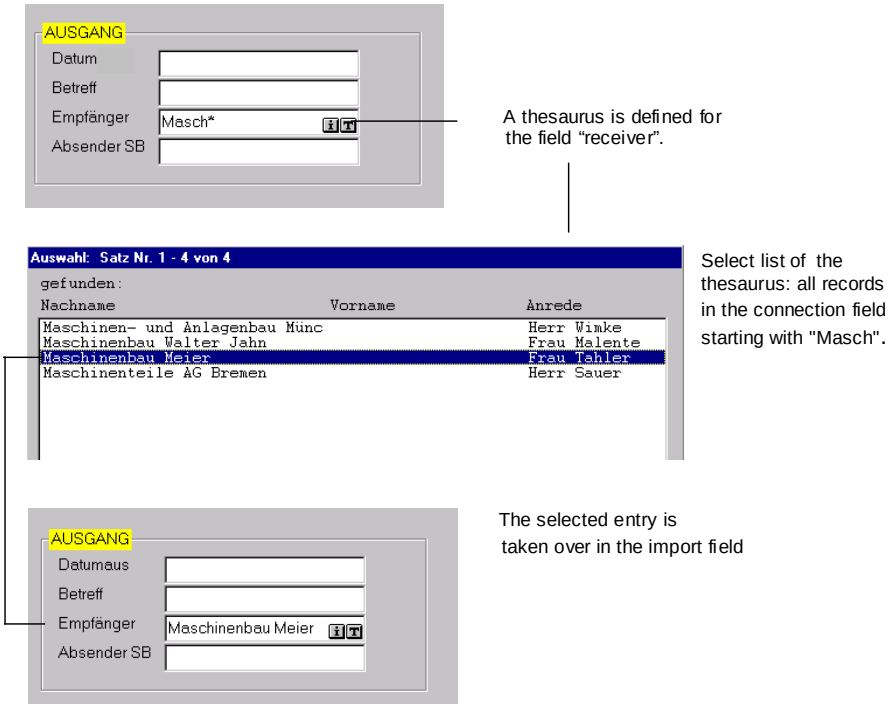
Follow steps 1-9 for each connection and do not forget that each individual connection must be saved (step 9).

If a field is already connected, the connection will be shown as soon as you select the field. You can change this connection or redefine the import fields. The modified connection must be confirmed with "Save".

If you want to completely delete the connection for this field, activate the "delete" command.

Example

Receipt of invoice:
The names of the respective recipient are applied from an address archive into an incoming invoice archive.



MORE INFORMATION ON THE TOPIC IS INCLUDED IN CHAPTER:

- 11.2 CREATE NEW PROFILE DATA

20. CONNECT ARCHIVES RELATIONALLY (ADDITIONAL INFORMATION)

Dr.DOC® offers the option to call additional information from another archive on a particular record entry.

Note

What is the difference between Thesaurus and additional information archives?

Any archive can basically be linked and/or relationally connected (additional information) as Thesaurus for any other archive.
Information is applied from a Thesaurus. That means: a Thesaurus does not provide information for browsing, but a type of "text building blocks", which are entered into the archive you are currently working with.
A relationally connected archive provides more information on the keyword. That means: you are working with existing data in both archives without exchanging this data. This associative search process is also called hypertext.

What is the difference between additional information and hypersearch?

In common: for both functions you are looking for associated information from various archives. For the hypersearch, a relational connection can also be automatically carried out as a further step.

The difference explained with an example:

The problem: you are looking for an invoice from the company Hobbs dated March 1996 and then want to query something over the phone.

The solution with additional information:
Search in the incoming invoices archive for "Hobbs and 03.1996". – The invoice will be displayed. – Call the address management via the "i" button in the name field. - The address with telephone number will be displayed.
Advantage: For clarity, you haben initially only the invoice data on screen, on request you immediately obtain the address data.

The solution with hypersearch:
First option:
Search in the incoming invoice archive and in the address archive for "Hobbs".
You will see the hit list immediately from both archives.
But the incoming invoices archive will display all invoices from Hobbs, not only the ones dated March 1996. A search for the invoice date would not have been possible, as it would have also been searched in the address archive in connection with Hobbs.

Second option:
A hypersearch in the incoming invoices archive is defined in such a way that every entry found in the name field, is also immediately searched for in the address archive. So you would be looking for "Hobbs and 03.1996" in the incoming invoices archive.
You will only find the required invoice in the invoice archive and immediately the address automatically in the address archive.
This search automates the process, which is carried out manually when using the additional information, but requires a little more time. As a hit list from both archives is initially shown again, another click with the mouse is required to display the data.

Examples

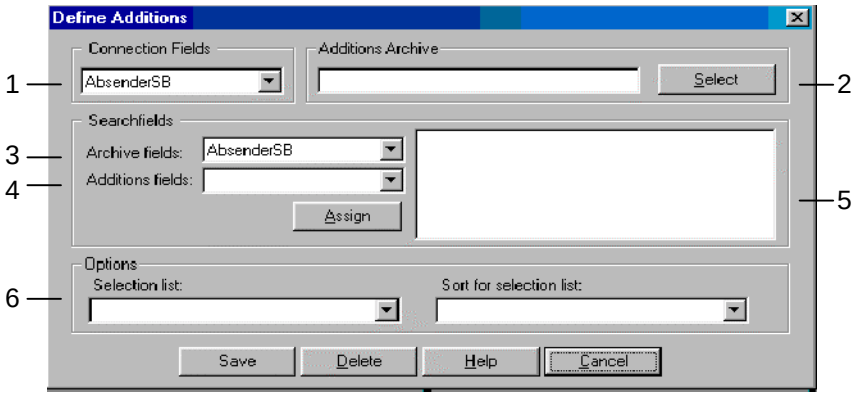
Reference archiv:
You have found a quotation on a certain topic by an author named Miller in a reference archive containing all the bibliographical information. You can now call the version concerned in another indep endent archive containing detailled information or short versions.

Receipt of invoice:
You have read a supplier's archived invoice and now require the supplier's address/telephone number to query something. For this purpose, an address management function is connected via the supplier's name containing the necessary data. (The same address management may also be connected as Thesaurus - see example in the previous chapter!)

To use the additional information, you must have defined an identical field in both archives, i.e. a field containing the same entry in both archives.

Link additional information:

Go to the dialog to link the additional information to the current archive (in the current archive) via “Settings/additional information ...“



1: Shows the current archive’s field names. Select the field, in which the additional information is to be called, from the list.

2: Select the archive to be connected with this field.

3+4: “Searchfields”:
Connect the selected additional information field (is displayed as standard) as the first “archive field”. Further searchfields can additionally be connected (AND link). “Archive fields” shows the current archive’s field names and “additions fields” shows the field names of the additional information archive. Select the connection fields from the respective lists.

5: After clicking the “assign” button the selection will be entered here. Further allocations are separated by “ ; “ (semicolon). When deleting allocations, ensure that you also delete the semicolon (“ ; “).

6: Sorting and the selection list of the additional information archive can be selected separately and may be different for each connection. This is particularly useful, if an archive is used for completely different additional information. The configurations, which were created directly in the additional information archive, are available.

Tip

Divide data

Use the connection option and divide your data according to topics into different archives, if convenient. You could have a connection from document management to address management, which is connected (e.g. via a name) to project management

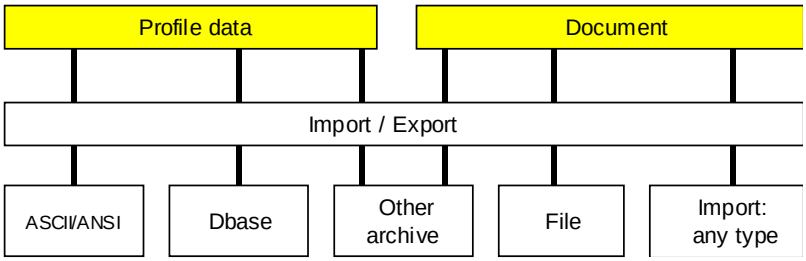
(and vice versa). The advantage: The respective data is arranged by topic into different "drawers" (communication, address data, project texts), which are not “loaded down” with information that is not essential for the topic, but from within a drawer another one can be opened directly and all associated information will be available.

MORE INFORMATION ON THE TOPIC IS INCLUDED IN CHAPTER:

- 13.8 CALL ADDITIONAL INFORMATION

21. DATA EXCHANGE

Brief information



The following describes:

- The import of profile data in ASCII/ANSI format or from another archive
- The import of profile data in Dbase format
- The export of profile data in ASCII/ANSI format (optionally with documents) into another archive
- The export of profile data in Dbase format
- The import of spool files via COLD interface

INFORMATION ON IMPORTING DOCUMENTS OF ALL TYPES IS INCLUDED IN CHAPTER:

- 11.3 ARCHIVE DOCUMENTS

INFORMATION ON EXPORTING INDIVIDUAL DOCUMENTS IS INCLUDED IN CHAPTER:

- 13.6.1 EXPORTING DOCUMENTS AS FILE

Tip

Other format?

If your import file is in another format you can nevertheless import it. Such a data file can usually either be converted in ASCII/ANSI or Dbase format - this converted file is then imported.
The same also applies to the export: export the data in ASCII or Dbase format and then import it to the other system in a second step.

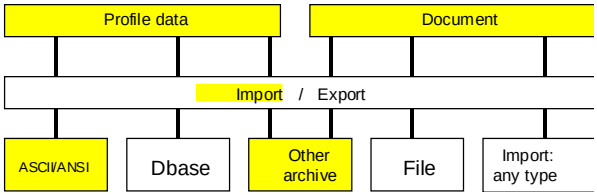
21.1 Preliminary remark: data format in DR.DOC®

For importing and exporting within Dr.DOC® you need data as separator information from Dr.DOC® , only the details for fields and records are required. The following separators are also used in the profile data within Dr.DOC®:

Separator:	ASCII value:
Field:	9
Record:	14
Paragraph (¶) within a continuous field:	13 10
Table line:	1
Paragraph mark	32 11
Document separator	10

21.2 Import

21.2.1 Importing ASCII/ANSI file or from another archive



"Import ASCII/ANSI" allows you to

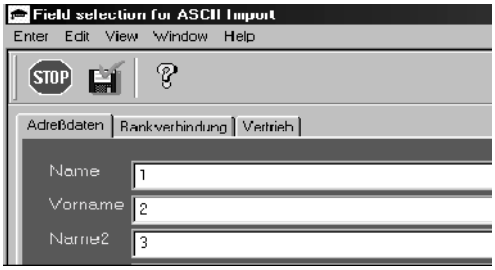
- import externally created ASCII data record files into an archive
- combine two Dr.DOC® archives into one (without document import).
- import spool data (see chapter 21.4.3 COLD-INTERFACE!)

Follow these steps:

Step by step

➔ Call "Settings/field selection for import ASCII" in the archive, into which data in ASCII/ANSI format is to be imported and consecutively number the fields, into which the data is to be entered. You can also combine several "source" fields into one destination field: enter the corresponding field numbers into the one new destination field for this purpose and separate with any character, which is then also applied in the import.

Example For records in format Name → Firstname → Name2 the following field selection should be stated:



But if first name and name (in this order) are to be combined into <u>one</u> field, the entry in the field "Name" should be: 2 1 . In this case a blank acts as separator.

Example for continuous fields:
For records in the continuous field, the following field selection can be made:

Name: 1
First name: 2

The result looks as follows: Name: Musterman
First name: Carl

The blanks entered as separators were applied.

Example for table fields:
For table fields, there are special features for the separators. The string between 2 numbers may look as follows:

a) String “=...”: Import into same line as previous number, all characters apart from “=” are applied

b) String “!...”: Import into new line, all characters apart from “!” are applied

c) Other string: Import into new line, NO character applied

	<u>Field selection</u>	<u>Result</u>
a)	1=2	Musterman Carl
	Name: 1= Firstname: 2	Name: Musterman First name: Carl
b)	Name: 1!Firstname: 2	Name: Musterman First name: Carl
c)	1 xyz 2	Musterman Carl

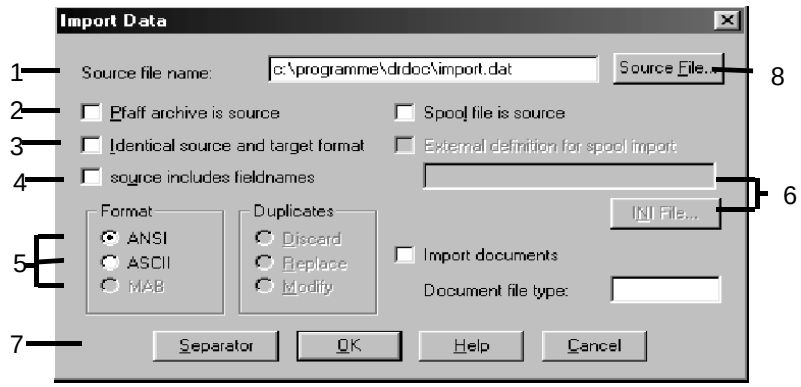
Attention Important for the import from other Dr.DOC® archives:

1. The field order for numbering is the sequence in the "database settings" (i.e. independent of arrangements in masks!).
2. The numbering starts with **6** for the first field (as the field numbers 1 to 5 are issued internally).

Note

If you want to import an archive, you only have to make the field selection, if the two archives are not structured identically. The field selection is omitted for the same format.

➔ Call "Database/Import ASCII/ANSI".



1: Enter the path and name of the file to be imported (e.g. c:\order\hobbs.dat). You can also call a file selection dialog via the "file" command and select the corresponding file.

2: Select, if you want to import data from another Dr.DOC® archive.

3: Select, if the order of data to be imported and the field order in the archive correspond. If this does not apply, you have to select a field (see above).

4: Enter the format of the source data: ASCII or ANSI.

5: If the current archive already contains data, it can be discarded, replaced or changed with duplicates, which may exist in the import file.

A duplication key must exist in the current archive.

6: Under certain conditions documents can also be imported with the individual records. These may only be ASCII or CI documents that are connected with a third party application (example see below).
To be able to identify the document file, it must have the same name as the data file with a corresponding different extension.
Select the option "Import documents" and enter the extension of the document file into the field.
Be aware that the documents are archived with the current program link. Check the settings under "Settings/ Doc.Association".

7: If you do not import a Dr.DOC® archive, call the "separator" command and enter the corresponding ASCII number values for the separators between fields, records and documents. The default setting (field: 9, record: 14) applies to importing Dr.DOC® archives.

The following separators are also often used:

Character	ASCII Code	Character	ASCII Code
→ [Tab.]	9	;	59
¶	13 or 10 13 or 13 10	<	60
		=	61
		>	62
"	34	?	63
#	35	@	64
$	36	[	91
%	37	\	92
&	38	]	93
‘	39	^	94
(	40	_	95
)	41	`	96
*	42	{	123
+	43	|	124
,	44	}	125
-	45	~	126
.	46	«	174
/	47	»	175
:	58		
		↓[Tab.]	11
		Space	32

8: To archive spool files, select this option. If the spool import is defined externally, also select the option and enter the corresponding ini file.

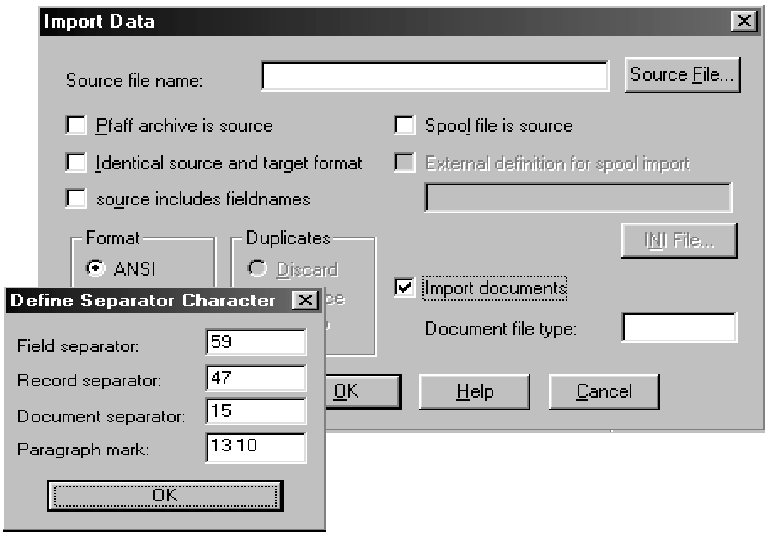
MORE INFORMATION ON IMPORTING SPOOL DATA:

- 21.4. COLD interface

➔ The import is started with the "OK" command.

Example

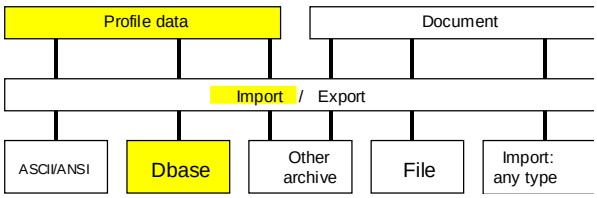
The file customer.dat with customer addresses is to be imported as profile data. In addition, there is a file called customers.asc with invoices to these customers. The address file and the invoice file are structured identically regarding the order: the first invoices are associated with the first address etc.



An editor is entered as document association.

In this way every address is applied into the archive with the associated invoices as one record.

21.2.2 Importing DBASE data



As the ASCII/ANSI data, data in DBASE format can also be imported into an archive.

- If the DBASE data is to be imported into the current archive, call "Settings/field selection for dBASE import" and consecutively number the field, into which the data is to be entered.

- If the DBASE data is to be imported into the current archive, check under "Field selection for data types" on the "Settings" menu that the correct data types(e.g. date, number field) are entered for the transmission.

If a new archive is to be created for the DBASE data, there is no need to carry out the action above.

➔ Call "Database/import DBASE".

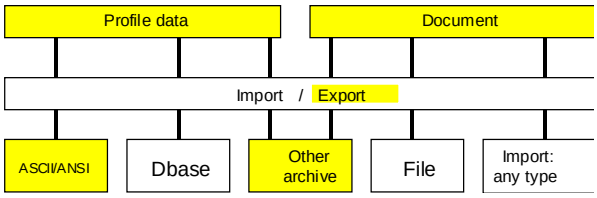
➔ Enter the path and name of the DBASE file to be imported.

➔ The data will be imported by confirming "OK". If a field selection for dBASE import is activated, data will be imported into the current archive (without query). If a field selection is not activated, you will be asked whether you want to create a new archive.

If a new archive is being created, it will automatically be named according to the DBASE file.

21.3 Export

21.3.1 Export in ASCII/ANSI format or into another archive



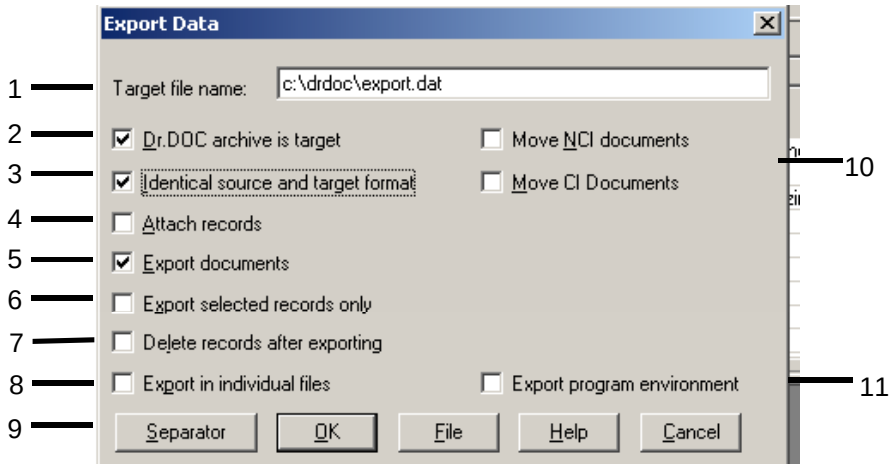
Profile data (optionally with documents) is only exported into another archive or as ANSI file, to enable a partial selection, via the "Export" command within selection lists.

➔ Call "Fiel selection for ASCII export" on the "Settings" menu in the archive from which data is to be exported in ASCII/ANSI format and enter the field names of the destination archive in the fields to be exported.

Note

1) If you want export into a Dr.DOC® archive, the fields only have to be selected, if the two archives are not structured identically. If they have the same format, the selection is not required.
2) Only the fields displayed in the mask are exported.

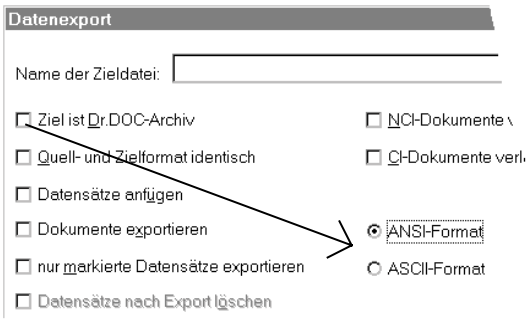
➔ Find the data to be exported with the search functions and call the "Export" command within the selection list.



1: Enter the path and name of the file, into which the data is to be exported (e.g. c:\order\hobbs.dat). You can also call a file selection dialog via the "file" command and enter the relevant file here.

2: Select, if you want to export data into another archive.

If the destination is not a Dr.DOC® archive, you have the additional option of selecting ASCII or ANSI format:



3: Select, if the order of data to be imported and the field order in the archive correspond. You have to select fields first, if these details do not correspond (see above).

4: Select, if the export file already exists and the new data is to be attached.

5: If data is exported into another archive, the documents may optionally also be exported.

6: Select, if you have made another selection on the selection list, so that only the selected records are exported.

7: Select, if the exported records are to be deleted after the export.

8: Select, if you want to export into individual files.

9: If you are not exporting into a Dr.DOC® archive, call the "Separator" command now and enter the relevant ASCII number values for the separators between fields and records of the destination file.

10: Swapping documents is a separate workflow and is described in chapter 25.

11: Select this option, if the program environment is to be exported, too (e.g. when archiving onto CD).

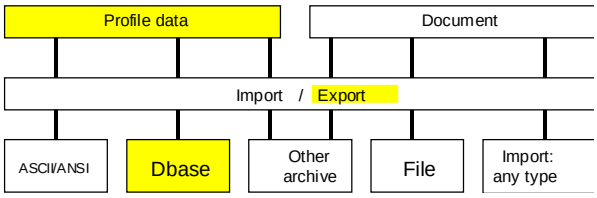
➔ The export is started with the "OK" command.

Tip

Remove possible sources of errors in advance

You should know the automatic fields, numerical fields, date fields, key fields and mandatory fields of the destination archive and these should not disagree with entries in the data to be exported. An error message will for example appear, if you attempt to make another entry in an automatic field or if you want to apply a record without an entry in a mandatory field.

21.3.2 Export in dBase format



Profile data without documents can be exported in DBASE format.

➔ Enter the order, in which the fields are to be exported under "Settings/ field selection for DBASE export".

➔ To export in DBASE format without any errors, ensure that

- records with fields that are longer than the default in the DBASE file are not transferred if you import into an already existing DBASE file

- total length and the positions behind the decimal point are entered for number fields behind the digit for the transfer order. That means: a number's total length is the entire number of characters with decimal point: 852.56 consists of six characters and two decimal places. If the number field is to be imported third, the entry in this field must be: 3 6 2 . The individual digits are separated by blanks.

- only lower and upper case letters and underscore (_) is permitted for naming the individual fields in accordance with DBASE conventions. If other, non-transferrable characters, e.g. commas etc. are included, replacement characters will be transferred.

➔ Now enter the name to be given to the file in DBASE format under "Database/Export dBASE...". The extension .dbf is automatically added. If the file does not yet exist, a Dbase file with the same name will automatically be created.

Note Be aware that memory problems may arise when transmitting a large amount of data, as data requires considerably more memory in DBASE format than in Dr.DOC®!

21.4 COLD interface

21.4.1 Overview

- **Definition:**
  COLD (**C**omputer **O**utput to **L**aser**d**isc) stands for memory-saving archiving of documents with uniform form, but different content. Form and content are saved separately and in different format: the form only once as bitmap, the modifiable data in ASCII format.

- **Scope:**
  Faithful archiving of documents from payroll accounting and goods management systems, e.g. pay statements, delivery notes, invoices, balance lists etc.

- **Function overview:**

  Importing documents: There are two start modes for importing documents with optional automatic keywords for quick searches (applying data from the spool file into the archive's profile data):
  - Manual start of COLD archiving
  - Automatic start through COLD archive server running in the background.

  Presenting documents: The COLD documents can be displayed on screen and printed. Regardless of the size, high presentation quality is achieved by showing the data not as bitmap, but as true type fonts. The customer-specific form is guaranteed by supporting all fixed true type fonts of the operating system.

21.4.2 Description of the components

COLD archive server:
Automatic, time-controlled import of spool files from certain directories. These directories and the spool files to be archived can be entered in the “spoolimp.ini” file.

Document-specific form template:
The document specific form templates must be saved as image (e.g. BMP, TIFF or JEPEG file). These form templates must already contain all formatting elements, e.g. frames, company logo etc.

Document view:
To view the document, the document-specific form image is loaded and the data is shown.

Conventions for the spool files (print files):
- The file name must always remain the same.
- The profile data is generated (automatic keywords) via the document-specific ASCII import definition. It can be controlled automatically via the file name, the file extension (example: data.001 = pay statement, data.002 = health insurance certificate) or a header entry (document or file header) containing the document type. Header start and end must be defined with unique control characters.
- The spool file only contains the text (the data). This guarantees faithful reproduction of the document as well as reduced memory requirement.
- The font (font type, size and line spacing) is determined with a unique control character string.

21.4.3 Using the COLD interface

① ▶ Set up COLD server:

For the automatic time-controlled import of spool data, the following action is required in addition to the settings stated:

- ASCII import definition at client or archive server as user "SERVER" (the user "SERVER" must be created by the system administrator via "Management/user manager"). (See step 4)

- Create spool import file (spoolimp.ini) according to the following pattern.
  This ini-file must be in the subdirectory \comm.
  When editing the “spoolimp.ini”, ensure that the name of the ASCII import definition is in capital letters and that there are no blanks within the parameter definition before and after "=".

```
[SPOOL_IMPORT]

SectionName=

;SectionName=FILEHEADER, <offset>, <length>
;SectionName=DOCUMENTHEADER, <offset>, <length>
;SectionName=FILE NAME, <offset>, <length>
;SectionName=EXTENSION, <offset>, <length>
;Maxnumber=(Default =0; means the number of records to be imported per
interval, 0 = all records are processed, 1 = one record per interval is processed,
2 = two records etc.)
[DEFAULT]

Archive=C:\DRDOC\comm\server\testx
Field selection=SPOOL1
appno=3
Format=ASCII
ImportDocuments=1
Duplications=discard
;(replace or change only, if ImportDocuments=0)
;Duplications=replace
;Duplications=change
NCI_Komp=0

LineSeparator=10
DocumentSeparator=35 49 36 35
PageSeparator=12
DocumentStart=35 50 36 35
DocumentEnd=35 57 36 35
PageStart=
PageEnd=
FileStart=35 49 36 35
FileEnd=
```

- Two subdirectories (“spool” and “work”) are automatically created by the server in the “comm” directory:

“spool”: Destination folder for buffer of the print spool file

"work": Server's editing directory for cold archiving (the print spool file is moved here from the spool directory prior to archiving).

Pattern

The paths can also be defined via an entry in the "spoolimp.ini".

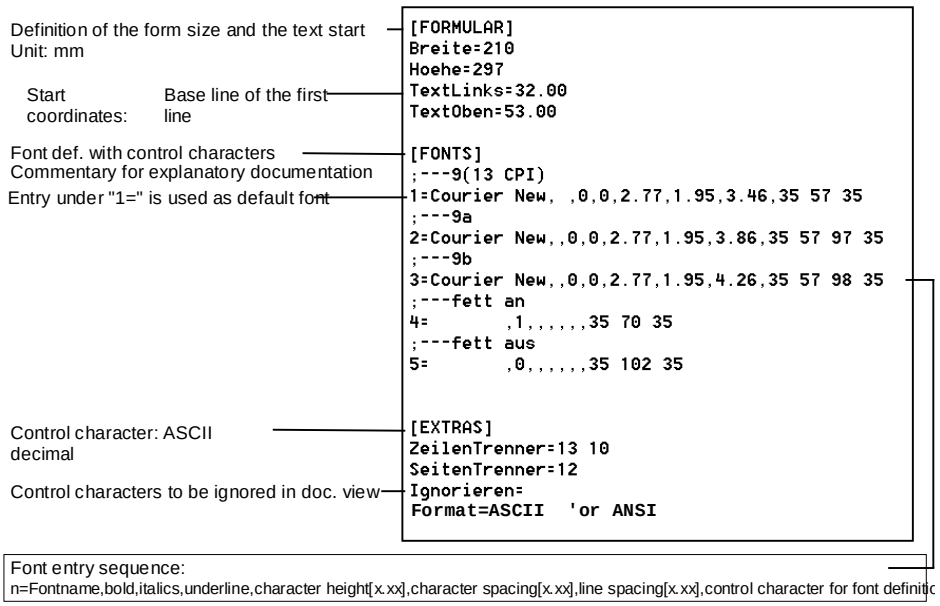
```
[FOLDER]
READ=1
ASCII=<Path f.ASCII import files (profile data)>
DOCUMENT=<Path f. ASCII import files (documents)>
SPOOL=<Path f. SPOOL import files (profile data and/or documents)>
WORK=<Working path>
```

- To activate the SPOOL function, start the server process. Go to "time control" via the "edit" menu item in the server program window and enter the required value in the "spool interval in minutes" field of the parameter.

② ▶ COLD view ini file:

The ini file is created with the help of an editor according to the following pattern. The fonts are determined by control characters, which can be defined without restriction. Font, font size and line spacing are determined at the same time by a control character string. Formats going beyond the standard character format of the font (standard, *italic*, **bold**, ***bold italic***) are not supported (e.g. style attributes like "underlined" etc.). All fixed true type fonts of the operating system are supported.
The ini file can be opened with the shortcut **Ctrl+Shift+C** in the COLD document view.

Pattern



Syntax for entering the control characters (for font definition, line separator, page separator and

[xx] or [xx xx xx] (control character sequence) or
[xx;yx;zx zy zz] (i.e. several control characters and control character sequences

③ ▶ Set document association for COLD archiving:

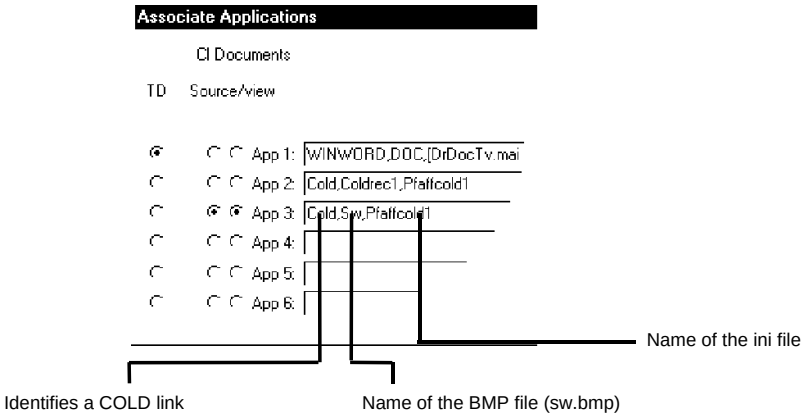
Call "Settings/document association". Determine

- whether the spool files are filed as CI (searchable) or NCI documents: subject to your decision, the entry is going to be in the CI or NCI documents column.
- the name of the document form with file extension (BMP graphics without extension!), to be filed in the document view. Allowed are, e.g. BMP, TIFF, JPEG etc.
- the name of the ini file for the graphic import of the archived spool data.

The entry takes place according to the pattern

Cold,[name graphic],[name ini file]

Example



The form template image (e.g. BMP file) and the ini file must be in the "Cold" folder, which must be one level below the archive-specific adm file. For C/S archives the "Cold" folder must be in the "form" folder. A second image for the following page can optionally also be created with the ”Cold” viewer. A second template image must be defined. The name of the second template image is entered after the ini file, separated by comma, (Cold,[name first template image.ext],[name ini file],[name –second template image.ext]). The "Cold" folder must be created by the system administrator. The image names are stated WITH file extension.

④ ▶ Determine import definition:

Now determine the import definition for applying import data to the profile data.

Call the spool file, e.g. in the DOS editor and determine the position of the field to be imported (line and column no.; is shown at the bottom right in the DOS editor!).
Then call "settings/field selection for ASCII import in the archive and enter the position of the field in the spool file in the import field according to the pattern

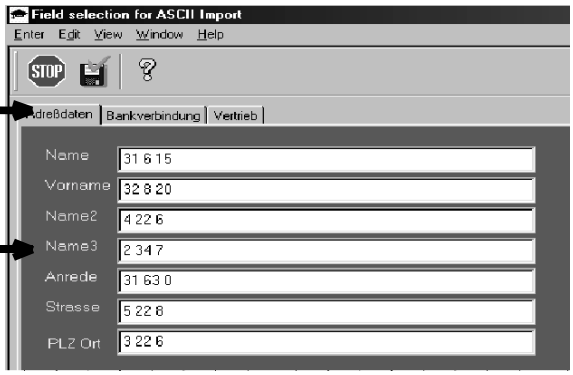
[Line No.] [Column No.] [Field length] [Definition of the first line]

The numbers are separated by blanks. The "Definition of the first line" is only required, if the parameter Dok.Start is defined. In that case
0 = First line starts after document separator
1 = First line starts after document start.

Example

In the spool file, the "Name" field is in line 31, column 6.
The field has a maximum length of 15 characters.

If the value 0 is entered for the field the content will be applied from the column no. stated to the end of the line.



⑤ ▶ Import spool data:

Call "database/import ASCII" and enter the path for the spool file.

Define the respective settings for the different import modes:

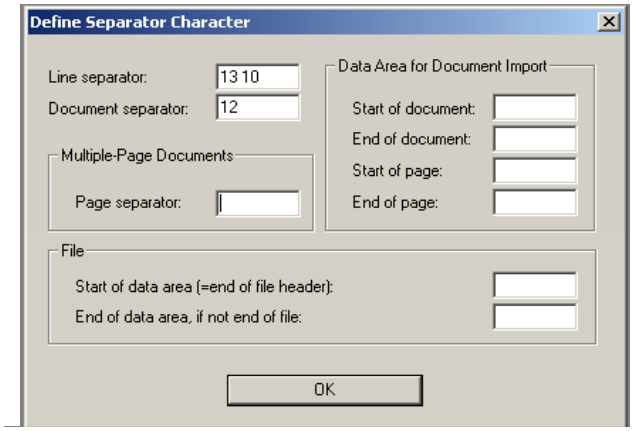
You want to ...	**Select:**
enter only fields from spool data into profile data:	spool file is source
attach entries in profile data and additionally the content of the spool file as a Word document	spool file is source Import documents
import only documents	spool file is source Import documents In addition, in this case: activate an ASCII import definition without entries.

Afterwards call the "separator" command and enter the separators as ASCII decimal value.

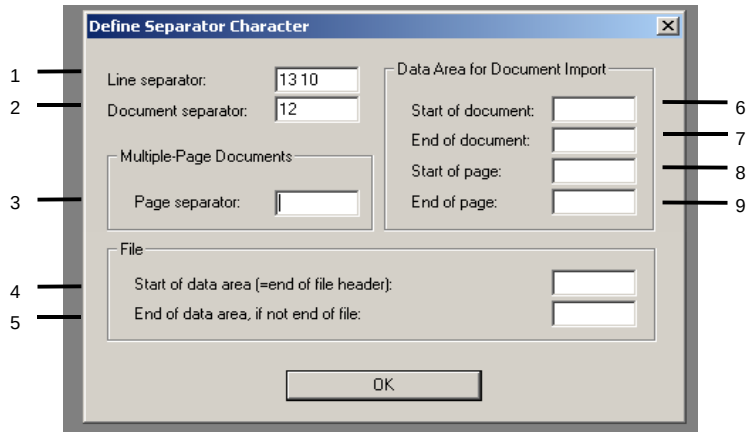
Example

13 = carriage return
10 = line feed
12 = form feed

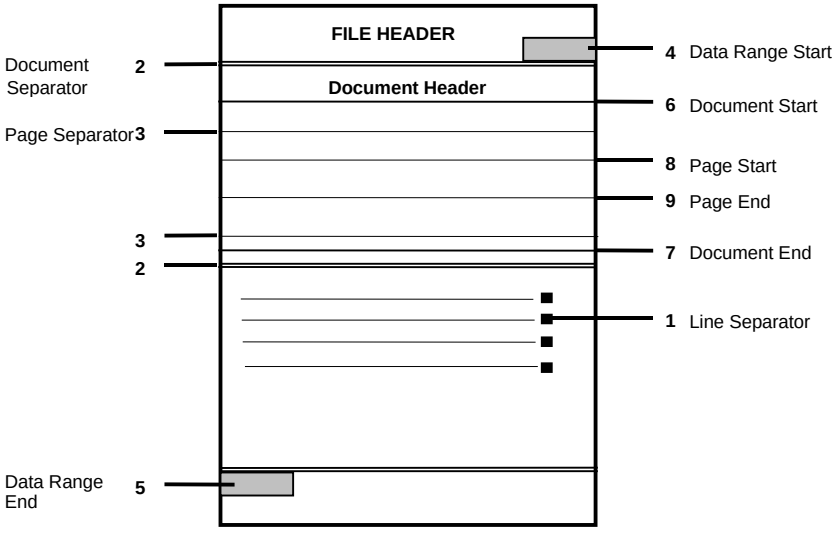
Separate several ASCII values in a field with a blank!



The following illustration explains the allocation of separators and spool file:


Define Separator Character
Line separator:
13 10
Document separator:
12
Multiple-Page Documents
Page separator:
Data Area for Document Import
Start of document:
End of document:
Start of page:
End of page:
File
Start of data area (=end of file header):
End of data area, if not end of file:
OK
1
2
3
4
5
6
7
8
9

SPOOL FILE:


FILE HEADER
Document Header
Document Separator
2
Page Separator
3
3
2
Data Range End
5
4 Data Range Start
6 Document Start
8 Page Start
9 Page End
7 Document End
1 Line Separator

21.5 Automatic Server ASCII Import

File pairs consisting of data file with associated document file of the same name can be imported automatically by the server.
It is configured according to chapter 20.4.3 COLD interface as described under point ① "Set up COLD server" (only point ①!!).

Please be aware that the entries for the "spoolimp.ini" are as follows:

```
[ASCII_IMPORT]

SectionName=

;SectionName=FILE NAME, <offset>, <length>
;SectionName=EXTENSION, <offset>, <length>
;MaxNumber=(Default =0; means the number of records to be imported
per interval, 0 = all records are processed, 1 = one record per interval is
processed, 2 = two records etc.)

[DEFAULT_ASCII]

Archive=C:\DRDOC\test\import
Field selection=AUTO_ASCII_IMPORT

AppNo=1
;AppNo=auto-associate app
;AppNo=ImageFileIntern

ImportDocuments=1
;FileTypeDocuments=doc
;FileTypeDocuments=xls
;FileTypeDocuments=*

Format=ASCII
;Format=ANSI

Duplication=discard
;(replace or change only, if ImportDocuments=0)
;Duplication=replace
```

```
;Duplication=change

FieldSeparator=9
RecordSeparator=13 10
DocumentSeparator=12
```

Carry out the further actions as described in the ASCII import definition under 20.2.

The ASCII files to be imported must be in the
..\COMM\ASCII directory,
the associated document files in the
..\COMM\ASCII\DOCUMENTS directory

The paths can also be defined via an entry in the “spoolimp.ini”.

```
[FOLDER]
READ=1
ASCII=<Path f.ASCII import files (profile data)>
DOCUMENT=<Path f. ASCII import files (documents)>
SPOOL=<Path f. SPOOL import files (profile data and/or documents)>
WORK=<Working path>
```

22. DR.DOC ISDN DATA COUNTER CHECK

22.1 Short description

The Dr.DOC ISDN counter check program allows automatic central archiving of decentrally generated documents across the company. The Dr.DOC counter check function is not only characterised by the fact that it enables the efficient illustration of complex corporate structures, but also that it guarantees the immediate availability of all archived data across the company in the central office.

22.2 Term definitions

No.	Term	Description
1	Central archive = counter check destination archive	Archives in the corporate central office: This archive is the destination of the ISDN counter check and is exclusively for centrally archiving per ISDN counter check.
2	Branch archive = counter check source archive	Decentral archive in company branch. Source archive for ISDN counter check and working archive for decentral archiving in company branch.
3	Dr.DOC C/S Communication path	Path for Dr.DOC Client/Server Communication: (e.g.: P:\Drdoc) This path includes all communication relevant subfolders, e.g. the communication directory (P:\Drdoc\Comm)

22.3 Basic prerequisite

An ISDN ROUTER software must be installed across the company to establish the telecommunication link between central office and branch.

22.4 Creating the ISDN counter check archive structure

Archive setup: The counter check archive structure is set up as follows.

- At first, the complete C/S archive environment for the corporate central office is created. The following should be observed:
- for the date-controlled and the user-specific counter check every counter check archive must include two corresponding database fields “modified on” and “modified by”, in which the date and user of the last modification or of the new record is automatically recorded.

Field name	Field type	Automatic field	Edit lock
Modification date	single-line	D	☒
Modified by	single-line	B	☒

- On the basis of a copy of this central archive environment, the local archive environment is created by editing the drive letter for the client communication path in the following files :

  - <Name>.BVP: (<Name>= Name of the user set)

```
--------------------------------
[BV]
c=Q:\DrDoc\user\user.bvd
s=P:\DrDoc\user\user.bvd
[1]
c=Q:\DrDoc\CLIENT\Archive1.DA
s=P:\DrDoc\COMM\SERVER\Archive1.DA
[2]
c=Q:\DrDoc\CLIENT\Archive2.DA
s=P:\DrDoc\COMM\SERVER\Archive2.DA
[3]
etc.
```

  - All .da files in the “client” directory: By means of editor via “find and replace”
    - find: P:\DRDOC\
    - replace by: Q:\DRDOC\

- IMPORTANT: If the counter check is not supposed to work solely in the standard mode “replace duplications” (i.e., corresponding record in the destination archive is overwritten with updated record from source archive): Counter check content must be configured by means of ASCII export definition (application example: Table content in the source archive is to be attached to existing table content in the destination archive). This ASCII export definition must be carried out under the user login of the counter check user for the branch archive environment.

- Dr.DOC C/S communication path structure: The Dr.DOC server communication path, which is identical across the company (e.g.: “P:\Drdoc”): is the core of this communication path structure i.e., this communication path applies respectively for the Dr.DOC server process in the branch as well as in the central archive environment. Branch and central archive environment are distinguished via the client communication path: for central archives the client communication path is identical to the Dr.DOC server communication path, e.g.: “P:\Drdoc”). For branch archives, the client communication path is then for example “Q:\Drdoc”.

Dr.DOC communication path structure for ISDN counter check: Overview

C/S component	**Communication path**	
	Central archive	Branch archive
Dr.DOC server process	P:\Drdoc	P:\Drdoc
Dr.DOC client	P:\Drdoc	**Q:\Drdoc**

A Dr.DOC client accesses a branch archive via the branch client communication path across the company: “Q:\Drdoc”

A Dr.DOC client can access a central archive via the client communication path of the central office across the company: “P:\Drdoc”.

22.5 Dr.DOC program files for ISDN counter check

The following Dr.DOC program files are required at the destinationarchive server.

No.	File	Description	Destination folder
1	docrepl.exe	Counter check program	DrDOC system folder
2	pt.ini	Counter check rule	WINNT (Operating system)

22.6 Counter check configuration: Counter check rule

The counter check rule is defined in the configuration file “pt.ini” as follows. (Explanations are emphasized in italics and enclosed with round brackets)

Explanations on “pt.ini”:

- In the first part, the configuration file “pt.ini” contains general control paramter across the archive for the counter check program (number, start time, start day and interval).

- In the second part of the “pt.ini” are archive-specific control parameter for the counter check archives [1] to [n]. The most important archive-specific control parameters are explained in the following “pt.ini”:

Search type:
The search for data to be counter checked at the beginning of the counter checking process can be started with one of the following three search types: Search type = 2 is recommended as standard configuration.

Search type	Name of the search type	Explanation
1	Find with search rule	Name of the search rule is to be stated in “search rule” parameter; The search rule (field search template) must be defined in the branch archive

2	Find with date	Find the records, which were newly generated or changed since the last counter check: “from till search” in the date search field (state database field name in parameter “date field”)
3	Find with search rule and date combined	Combination of search type 1 and 2

----------Begin “pt.ini”----------

[PT_COUNTERCHECK]
Number=n *(number of branch archives to be counter checked)*
Start time=02:01 *(Start time of the counter check)*
Start day=29.09.1998 (*Start day of the data counter check program)*
Interval=1 *(time increment in days for data counter check program)*

/* Search type=1 find with search rule
/* Search type=2 find with date
/* Search type=3 find with search rule and date combined

[1]
Connection=\\PCNAME\release\p *(release name branches - Comm-Drive)*
Source archive=q:\archive\client\archive1 *(call path source archive (=branch archive))*
Destination archive=p:\archive\comm\server\archive2 *(call path destination archive (=central office))*
Search rule=TEST1 *(if “search type” = 1 or 3: search template))*
Export selection=DATACOUNTERCHECK *(if “Export_with selection”=1, for dpl.)*
Search date=28.09.1998 *(date of the last counter check)*
Date field=modification date *(database-field name date-search field)*
Search type=2 *(defining the search type)*
Export_with_selection=0 *(“0” = off; “1” = on)*
Counter check date=29.09.1998 *(archive-specific counter check date)*

Interval=1 *(archive-specif.. time increment in days)*

[2]
•
Ÿ
Ÿ
[n]

----------End “pt.ini”----------

22.7 Starting the counter checking program

The ISDN counter checking program is started at the destination archive server PC and counter checks the contents of the source archives always and exclusively in the direction of the central office.

Starting the counter checking program:

- Start type: optionally “automatic” or “manual”
- User login: Enter login name and password of the counter check user here. This counter check user can be defined as one pleases, but must have the following attributes:
  - access permission for all source archives (i.e. this user (supervisor rights) must be entered in all user sets participating in the counter check)
  - Access permission for destination archive (supervisor rights)

23. CHANGE PATH DETAILS

An archive's path details can be changed at any time. To guarantee continued smooth working with the modified application, the following notes should always be observed.

Important

All files belonging to an archive must **NEVER** be moved with the file manager or explorer, as otherwise the archive internal management does no longer apply! **Always** make path changes via "management/edit archive parameter..." and in accordance with the following instructions!!

- Changing the details for management, archive and help files:
  The files concerned are automatically copied to the new path and at the same time deleted in the old path. Any existing CI and NCI archives are not copied or deleted (see below).
  For C/S applications the subdirectories MUST keep the defined names comm\server or client (management files), dbase (archive files) and form (help files) in the new path!

C/S

- Changing the details for data transfer templates:
  This information concerns the directory, which is opened, when you start the "transfer data" function. The files to be available in the new path must be copied to the new directory by the user.

- Changing the details for NCI and CI archive:
  The new details will apply to all documents newly archived from this time. Already existing documents remain in the path stated at the time of archiving. If this path or this data media cannot be found when viewing a document, the document cannot be displayed or a message stating the data media required will be displayed.

Note

If existing documents are to be moved, an extra menu item within the data export is used for this (see chapter 25). The following applies to this instance, too: NEVER move with the file manager!!

- Changing the details for local working directory:
  For this path change, the files with the extension txt should be copied into the new directory to avoid possible errors occuring in the data transfer function.
  In addition, the data transfer macro must be set to the new path. If you are using the supplied Winword macro, it is easiest to call the drdocmak.doc file as in the new installation and to change the details here.
  C/S Be aware, the local working directory must be identical on all workstations and at the archive server!

- Changing the details for automatic archiving after TD:
  This detail must be changed, if the stated archive was moved to a new path or a new connection is to be created. In any case you must ensure that the archive stated here does exist.

24. TRANSFORMING ARCHIVES

24.1 Transforming a local archive into a C/S archive

You might have created an archive locally and entered the data into it. This archive is now to be accessed by more users and is therefore to be transformed into a C/S archive in an existing C/S system. The following explains the individual steps that are required.

All steps are explained with an example for better understanding. It is of course possible to use other names, which then have to be converted accordingly.
As some other paths have to be stated for a separate archive and network server, this will also be dealt with at the corresponding positions.

The example is based on the following prerequisites:

There is a C/S system where Dr.DOC® is set up on the archive server in the directory C:\DRDOC. A client's local drive has an archive with the name "Letters" in the directory D:\TEST.

This archive is to be available to all clients as C/S archive in the future.
If network and archive server are one device: the corresponding archive server drive is the N:\ drive from the client's view, from the server's view it is the C:\ drive.
If network and archive server are two devices: the network server drive from the client's view is contacted via E:\, the archive server is contacted via C:\ .

At first, you are working at the client (points 1-4)**:**

1. You open the "Letter" archive and call all records (e.g. by entering * in a field with an entry in *every* record).

2. The records of this select list is completely **exported** into the drive or directory, which also contains the other archives at the server. In our example, it is called:
   Network and archive server one device:
   N:\DRDOC**COMM\SERVER**LETTERS.DAT.
   Network and archive server are two devices:
   E:\DRDOC**COMM\SERVER**LETTERS.DAT.
   The following options have to be selected for the export:
   - Dr.DOC® archive is the destination
   - identical source and target format
   - export documents

   confirm with "OK". Confirm the queries whether the destination archive is to be created or reset with "Yes".

3. exit archive, answer query after saving the settings with "Yes".

4. If network and archive server are one device:
   Call the .da file (N:\DRDOC**COMM\SERVER**\LETTERS.DA) with an editor (e.g. Windows') and change the paths so that they are correct from the server's view: In the example, the N:\ drive is always changed in C:\.
   If network and archive server are two devices, this step will not be necessary.

Now continue working at the archive server (point 5-8)**:**
Please be aware: the server program docserv.exe must not be running.

5. Load Dr.DOC® and call the "Letters" archive in the C:\DRDOC**COMM\SERVER**\LETTERS.DA DIRECTORY (or for separate network and archive server E:\...) via "archive/open archive".

6. Call "management/edit archive parameter..." and select network mode in the archive parameters.
Then the paths for the various files are changed and set up as server paths.
If you have already archived documents, you have to observe the following: **Do not yet** change this path, as the existing documents have to be moved first. This is done in a separate step.

   Change the path concerned in the following way (instead of C:\DRDOC select the *drive**directory*, where the archive is meant to be):

Path for...	**Network/archive server ONE device:**	**Network/archive server TWO devices:**
Management file:	c:\drdoc**comm\server**	**e:**\drdoc**comm\server**
Archive files:	c:\drdoc**dbase**	**c:**\drdoc**dbase**
Help files:	c:\drdoc**form**	**e:**\drdoc**form**
NCI archive:	DO NOT CHANGE	DO NOT CHANGE
CI archive:	DO NOT CHANGE	DO NOT CHANGE
Communication:	c:\drdoc**comm**	**e:**\drdoc**comm**

   Now call "edit client parameter" and change the paths there so that they are correct from the client's view. With reference to our example, the paths concerned must then be changed in the following way:

Path for...	**Network/archive server ONE device:**	**Network/archive server TWO devices:**

Management file:	c:\drdoc**client**	**e:**\drdoc**client**
Help files:	**n:**\drdoc**form**	**e:**\drdoc**form**
Communication:	**n:**\drdoc**komm**	**e:**\drdoc**comm**

Confirm the client parameter and afterwards the archive parameter with "OK". If required, confirm error message via the non-copied file with "OK".

7. Now call "Settings/ field selection for key fields" in the "Letters" archive and confirm with "OK".

8. Now check whether you can call the archive's data (still at the archive server!). Start any search and check whether the data can be displayed without error messages. Should error messages appear, check the above steps again and all path details, in particular the drive names.

9. If you can view the data without problems, you can now move the already existing documents. You can do this for identical network and archive server, but you have to do it for a separate network and archive server (as the documents are currently still on the network server).

   Call all records for this purpose. On the select list activate the "Export" command and within it the "Move NCI documents" option. Enter the new path and start moving the documents with "OK".

Important

The path for moving the documents must not be identical to the path for archive files - i.e. not dbase, but e.g. docu

Note

The NCI and CI documents should definitely not remain on the network server (where they currently are) if network and archive server are separate. The archive server is used for this by default.

Activate the "Export" command again and then the "Move CI documents" option. You can put the CI documents on the same path as the NCI documents.

10. Now call "management/edit archive parameter ..." again to change the path for the document archives. This change **must** be executed, if network and archive server are two devices.

Path for...	**Network/archive server ONE device:**	**Network/archive server TWO devices:**
NCI archive:	c:\drdoc\docu	c:\drdoc\docu
CI archive:	c:\drdoc\docu	c:\drdoc\docu

11. Then exit Dr.DOC®.

After you have started the server program at the archive server, carry on working at the client again:

12. Now call the "Letters" archive via "archive/open archive": N:\DRDOOC**CLIENT**\LETTERS.DA. Afterwards enter it via "management/user manager" into the user set.
A user set is required in C/S mode. If you did not have any users set up in the local archive, you will nevertheless be asked for a password when calling as client. Enter "DRDOC" as user and "drdoc" as password (match case!). Then set up several users in "management/user manager" (for more details see chapter 16 USER SET).

Note

If you receive an error message, e.g. that this archive does not exist, check all steps in the correct order again to see whether they were executed properly. In particular check whether all path details in the archive and client parameters (in "management/edit archive parameter...") correspond exactly to the drives and directories used by you.

24.2 Transforming a C/S archive into a local archive

To transform a C/S archive into a local archive, it's easiest to use the export function.

Step by Step

① ▶ Call archive:
Call the archive to be transformed at the archive server.

② ▶ Find data:
If you want to transform the archive inclusive of all data into a local archive, find all records.

If you only want to have the database structure available for a local archive, only find a few records. These are only required to enable you to carry out the export and are then deleted again in the new local archive.

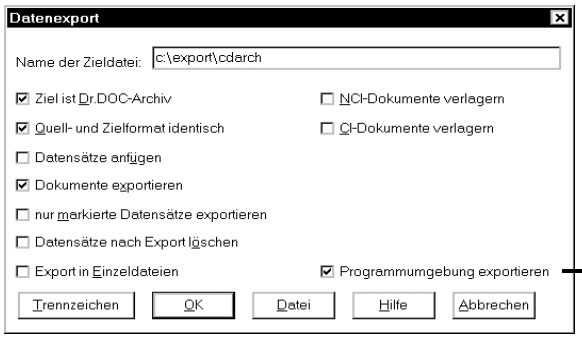
③ ▶ Export:
Then select on the select list the "Export" function and proceed as described in chapter 20.3.1.
Enter a local directory on the archive server as the destination.

④ ▶ Set local archive:
When the export is completed, the new local archive can be copied or moved to another computer (but to a directory with the same name!) . In addition you should check and correct, if required, the settings for Thesaurus, additional info definitions etc.

24.3 Creating a DR.DOC® CD search archive

① ▶ Creating the CD on the original archive PC:

- Creating the search archive (archive name e.g. "cdarch") by exporting the required records from the original archive into a destination folder in the root directory (!), e.g. c:\export.



- Open export archive (i.e. "c:\export\cdarch") and the "Settings/ field selection for.." select list, check sorting and column headings.
- Write CD-ROM:
  Using a CD-ROM writing software, write the entire destination folder onto CD (in the example: the "export") folder.
- If a Dr.DOC® help is to be made available for the local CD archive reading station, the "Help" folder must be 1:1 written onto CD. Ensure that the path for calling the help on the original archive PC and at the CD archive reading station is identical (e.g. c:\drdoc\help).
- A folder (e.g. "inifile") must be created on the CD, which contains the archive-specific ini file(s) from the local working directory (e.g. c:\drdoc\tmp) of the export archive (in the example: cdarch.ini). In addition, this folder must include the archive.ini file, which is on the original archive PC in the operating system folder (windows or winnt).

② ▶ Local CD archive reading station:

- The folder for the local working directory (e.g. c:\drdoc\tmp) must be on the PC or must be created.
- Please copy all archive-specific ini file(s) from the "inifile" folder on the CD into this directory.

- Copy the archive.ini file into the operating system folder (windows or winnt).
- Create a Dr.DOC® call icon on the desktop with the command line:

  drive\export\system\drdoc.exe *drive*\export*archive name*.

  Instead of *drive* enter the letter of the CD-ROM drive, instead of *archive name* the name of the archive.

Example

For the example archive cdarch in the CD drive E: the command line would be:

e:\export\system\drdoc.exe e:\export\cdarch

Open the Dr.DOC® CD search archive: Double-click on the Dr.DOC® call icon on the desktop.

Note

The operating system of the original archive PC and the CD archive reading station should be identical to ensure smooth running.

ARCHIVE MAINTENANCE

An archive should be

- reorganised from time to time
- backed-up frequently subject to how often the data is changed.

In addition, if a number of data media is used, the documents should be moved from time to time.

25. REORGANISE ARCHIVE

You should call the menu item "reorganise archive" on the "management" menu,

- if you have made many changes in the profile data. The profile data reorganisation leads to the space, which the deleted records take up, is freed again. You find out in the "Info" menu item on the "database" menu whether such deleted records (=data blocks not used) exist. If this overview information on the current archive includes a larger number of non-used data blocks, a profile data reorganisation is recommended,

- if documents were moved or deleted. The reorganisation of documents, which must then be carried out, leads to the space, which is still reserved by the moved or deleted documents in the "original container", becoming available again.

- if keys are to be newly established.

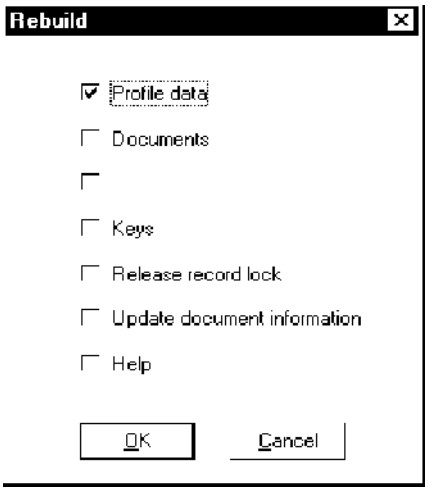
Step by Step

① ▶ Backup archive:

Prior to any reorganisation, you should backup the entire archive or at least the archive data concerned.

② ▶ Start reorganisation:

Call "management/reorganise archive ....



Select the required reorganisation runs:

The reorganisation of ...	**leads to:**
Profile data	space of non-used data blocks within the file being freed
Documents	space of moved/deleted documents being freed
Redlining	space of non-used data blocks in the redlining file being freed
Keys	Updating and release of non-used data blocks in the indices
Release record lock	Release the "record locked" message
Update document information	Update the document size information on the select list
Help	Release non-used data blocks in the current help (if a lot of changes were made)

The reorganisation is now carried out.

Note

During a document reorganisation the program ocassionally discovers documents, which cannot be edited. A corresponding message will be shown in this case. The documents or records concerned are stated in a log file , which is created under the name prot.001 in the local working directory and which can be read with any editor. The profile data of the record on the basis of which you find the corresponding record in the archive and you can remove the source of the error, is found in the log file.

26. BACK UP ARCHIVE

▶ Basic considerations:

A general statement about how often you should backup data cannot be made. This varies from case to case.

Duplicating stocks should only be seen as an additional long-term safety measure, as this duplicating will not be continuous, but will only take place, e.g. when a WORM plate is full.

The medium-term backup, which should monitor a system status at a certain time, must take into account that an error, which may be caused by human error, has crept into the system. But the transaction security in some networks is not as high as one would like to see. This backup should generally take place at the end of a work day either on MO plates or magnetic tapes. The risk can be considerably reduced with this measure.

In large archives, changes and additions are constantly made. To keep this work, which may not require a lot of memory, but which is important with regards to content (e.g. resubmission dates etc.), secure in the system, continuous backup of the documents and in particular of the management data must take place, especially if there is a large circle of users. The most elegant solution is probably the use of failure-safe hard disks. Mirrored disks or RAID systems, which apart from mirroring also save abundantly and automatically recognize and correct errors, are useful here.

▶ Data to be backed up?

There are different possibilities for backing up an archive:

To be backed up:	**File name extension:**	**in the directory ..**
Profile data only for possible re-import	dat	for archive files
profile data with its management files	dat, ptr, rnr, id	for archive files
NCI documents (only sensible together with profile data)	- svw - sdi, sdo	- for archive files - for NCI archive
CI documents (only sensible together with profile data)	- tvw - tdi, tdo	- for archive files - for CI archive
the entire archive	[all]	for - archive files - help files - NCI archive - CI archive For C/S : in the subdirectories - dbase - form - comm\server - client

FURTHER TOOLS

27. MOVE DOCUMENTS TO CD-ROM

If you have to manage large quantities of documents, a sensible archiving procedure would include placing the documents initially on the hard disk of the archive server and moving them to optical disks after a certain period or a certain number of documents.

Step by Step

① ▶ Backup

At first, backup the Dr.DOC® archive. The data directories to be backed up can be found in "management/edit archive parameter".

② ▶ Current archive: move documents

Find records, select if required, click on the "Export" button on the select list and choose "Move CI" or "NCI documents" and state map directory.

Example

Note

The maximum size of the document swap volume can be adapted to the capacity of the swap data medium with the following entry in the archive.ini (in the Windows directory) (Match case!):

```
[PEGASUS]
FREESPACE=500
```

Explanation: "FREESPACE=500" restricts the document swap volume to 500MB. This size is recommended, as the profile data automatically exported with the documents also takes up memory space. When the maximum document swap volume is reached, a new swap directory can be entered or the process can be cancelled.

③ ▶ Current archive: Complete reorganisation

Now reorganise the profile data and documents in the current archive.

④ ▶ Write CD

The swap directory (in the above example c:\docu1) is now written onto the CD with a CD-writing software.

Important

If the documents are moved to a subdirectory, the entire directory structure must be written!

⑤ ▶ Current archive: Adjust drive letter

Edit the archive files with the extensions svw (NCI documents) or tvw (CI documents) with an editor (e.g. Notepad.exe) and change the drive letter in the last line, e.g.:

2=C:\ Docu1 change in 2=*X*:\ Docu1,

"*X*" stands for the drive letter of the CD ROM drive.

Note

If you use jukeboxes the data media identification must be inserted before the directory path, e. g.:

2=C:\ Docu1 change in 2=X:\Disk1\Docu1.

⑥ ▶ Identify CD

Now label the CD with the data media number.

⑦ ▶ Check result

Now check the swap process with document view of swapped documents. The documents must be read by CD: If a jukebox is not used, a message appears when viewing the document, stating the data media required.

Example

"Please insert data media no. 2 into drive E: on"

⑧ ▶ delete swap directory

Now delete the swap directory on the computer (in the above example c:\docu1).

Tip

The location of the archived documents is noted program internally. If you additionally would like an overview, you create a note in a field of the profile data. The quickest way is to activate the "replace" function on the select list and enter the note in all records.

Note The basic path details for the CI/NCI documents remain untouched by the swap: All documents newly archived from now on continue to be in the path stated under "edit archive parameter...".

28. UNSET ARCHIVE

"management/unset archive..." deletes all data (profile data and documents) from an archive. The archive structure remains and can be filled with new data.

➔ Call "management/unset archive". You will be asked whether you really want to delete all data. Confirm if you are sure.

29. DELETE ARCHIVE

An archive with all data, forms etc. may no longer be required and you may want to delete it.

➔ Call the archive concerned as usual and then activate "management/delete archive...". After a security query all files and data belonging to this archive are deleted.

30. COPY ARCHIVE STRUCTURE

If you want to use the database settings (fields) of an archive for another archive, call "copy archive structure" on the "management" menu and enter the name of the new archive.

31. HELP SELECTION AND MAINTENANCE

You can call the help menu at any time, if you require information

- on certain keywords (index),
- Topics (Topics)

- or on the menu item, in which you are currently (context).

The standard help texts can be changed by the user at any time and archive-specific help can also be created.

31.1 Archive-specific help

Dr.DOC® includes extensive help texts on all menu items, which can be called at any time. But when inputting entries, e.g. into a literature archive, you may come across a case where certain internal conventions have to be observed, which not everybody working with this particular archive can always remember correctly. Dr.DOC® solves this problem by allowing the user to change the standard help texts as required and thus enabling an archive-specific help to be created. Important information specially for the standard help text in the literature archive mentioned in the example can then be added to this archive.

The WHELP standard help is activated when calling an archive. Under "Help/select help" you can select the path and name of another help file you require.

If you want to create an archive-specific help or convert local help into central help, enter the required new name and path. In the following file selection dialogue enter the path and name of the help file to be copied. This will be the "basic stock" for your new help.

Tip

Archive-specific help for all

If you want to use an archive-specific help not only on the clients, but also on the server, convert this help into a C/S archive. The individual steps for the conversion are included in chapter 22.

Note

You can also call an (existing) special help on an archive directly with the program or the archive-call.

MORE INFORMATION IS INCLUDED IN CHAPTERS:

- 8.1 START
- 10 SELECT ARCHIVE

31.2 Change help texts

To change the help texts, move the cursor to the required position and enter your text. Remember that a paragraph within a help text is created with **Ctrl +** ↵. The required changes are applied with the "change" command.

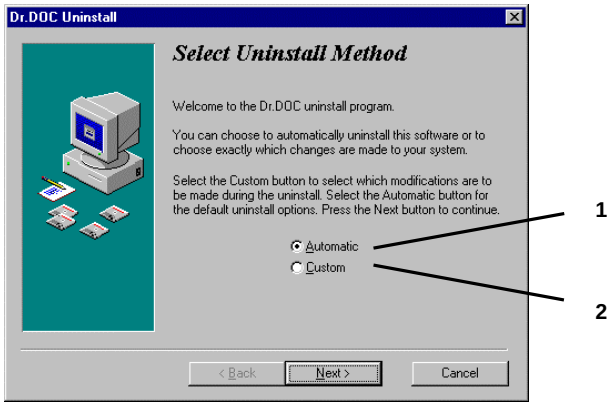
32. DEINSTALL DR.DOC

If Dr.DOC® is to be completely removed from the computer, carry out the following actions:

① ▶ Start uninstall program:

Start the Dr.DOC® uninstall program from the start menu or on the explorer from the Dr.DOC system directory.

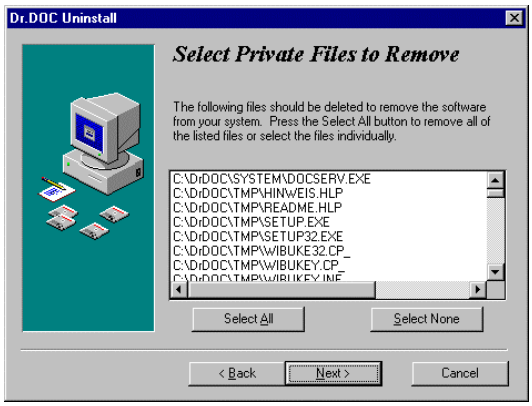
② ▶ Select option:


Dr.DOC Uninstall
Select Uninstall Method
Welcome to the Dr.DOC uninstall program.
You can choose to automatically uninstall this software or to choose exactly which changes are made to your system.
Select the Custom button to select which modifications are to be made during the uninstall. Select the Automatic button for the default uninstall options. Press the Next button to continue.
Automatic
Custom
< Back
Next >
Cancel
1
2

1: Select this option to uninstall the complete program without any further queries.
2: Select this option if only certain components are to be uninstalled.

③ ▶ Select components to be removed:

If you had selected the "Custom" option, you can now select files and directories to uninstall.



Select the corresponding entries in the list box. To select all entries, choose the "Select All" command. The "Continue" command takes you to the next selection. After the last selection, the program will be uninstalled.

APPENDIX

The appendix contains

a glossary

a description of possible error messages

an index

GLOSSARY

The following briefly explains technical terms used in the manual. Links to other terms within the glossary are identified with an arrow →.

ADF
Automatic **D**ocument **F**eeder: automatic document feeder for scanners and copiers.

Archive
The term "archive" describes the data stock of an archiving solution, for example a document collection, and the respective available process editing potential, for example the interface to a word processing program.

ASCII
American **S**tandard **C**ode for **I**nformation **I**nterchange: Coding of letters, digits and special characters in →CI documents.

Resolution
Scan or print quality of a documents, stated in dpi (dots per inch:).

Bit
Smallest information unit in the computer, which has the value 0 or the value 1. Eight bits are called a →byte.

BMP
Bit**m**ap-**P**icture: Graphic format under Windows and OS/2 for 1, 4, 8 and 24 →bit color depth.

Byte
Sequence of 8 associated bits. The following further units are normal:

Kilo byte	1 KB =	1024 Bytes	2^{10} Bytes
Megabyte	1 MB =	1024 KB	2^{20} Bytes
Gigabyte	1 GB =	1024 MB	2^{30} Bytes
Terabyte	1 TB =	1024 GB	2^{40} Bytes

CAD
Computer **A**ided **D**esign: Software for construction drawings.

CD ROM
Compact **D**isc **R**ead **O**nly **M**emory: Visual computer storage for the PC. The data can only be read by the user, but not changed.
→WORM

CI
Coded **I**nformation: Letters, digits, drawings etc. are saved in coded form (for example wordprocessing documents, →CAD drawings, spreadsheet documents) and can then be read by the computer.
→NCI

Client/Server
A special type of network mode enabling fully parallel working. Explanations and recommendations on various application options are included in the installation chapter.

Record
Saved → profile data with or without document. An →archive consists of a certain number of records.

DDE
Dynamic **D**ata **E**xchange: interface for exchanging data between different application programs.

Decompression
Reversal of the →compression, for example when recalling compressed archived documents.

Digitalising
Transforming a paper document into a format that can be read by a computer.
→Scanner

Document
→CI/NCI file

dpi
dots **p**er **i**nch: →visual resolution of digital images

Image
Image of a document, which is for example scanned and filed as →NCI document.

Index
Alphabetic list of terms structured as binary tree, which makes access possible in seconds when searching.

JPEG
Joint **P**hotographic **E**xperts **G**roup: Compression standard to reduce the memory requirement of images.

Jukebox
Jukeboxes are storage and management location for visual data media.

Compression
Reducing the data volume of a NCI or CI document to be archived.
→Decompression

MO, MOD
Magneto **O**ptical **D**isc: Magneto-optical storage disks, which in contrast to →WORM disks can be written and deleted again by the user several times.

Multimedia
Combination of text, graphics, video and audio on the computer.

NCI
Non **C**oded **I**nformation: Documents saved as →image (image document). Cannot be interpreted by computers (for example, letter scanned as image).

→CI

OCR
Optical **C**haracter **R**ecognition: Transforming image information (NCI document) into text information that can be interpreted by the computer (CI document). "Black dots" are converted into the meaning of the individual character.

PCX
PC-Paintbrush-Pi**x**el format to support 1, 4, 8 and 24 →Bit color depth.

Profile data
Descriptive part of a record, in which mostly ordering features, e.g. reference number, subject, officer etc. are entered for easy retrieval of the document.

Scanner
Electronic copier, which makes the captured image available as →digital image and not on paper.
→NCI

Keyword
Search terms for a document describing its contents.

Thesaurus
"Dictionary" of possible entries in →profile data fields, which the user can refer to at any time.

TIFF
Tagged **I**mage **F**ile **F**ormat: Format of bitmap files. Supports 1, 4, 8, 24 and 32 bit color depth. This format has numerous compressing variants.

Hit list
Result of a search in a DMS.

Text retrieval
Search in a continuous text, which is not structured.

Wildcard
Variables (joker) for not closely defined characters in a search.

Workflow
Automatic control of documents or processes.

WORM
Write **O**nce, **R**ead **M**any: Optical storage disks (CDs) which the user can write once, but which can be read many times.

ERROR MESSAGES

***file name* could not be loaded:**
Error: In document/new a file was selected, which does not correspond to the programapp (e.g. Winword file for app intern).
Procedure: Call "Settings/Doc.Association" on the main menu and correct the details.

User xxx already has access to archive:
Error: A user (and password) was selected in user login, who already has access to the archive concerned.
Procedure: Try accessing the archive with another user name you know.
If a user remained logged in when the program was not exited properly and thus the message appears, another registration can take place. But be sure that you only confirm a new login, if you are really sure that nobody is working with this user name.

User has no access right:
Error: An incorrect user name was entered in user login.
Procedure: Correct the entry and match case.
It may be that the user does not have access to the archive concerned. The header of the dialogue shows the archive for the query.

Please increase memory or reduce resolution:
Error: Memory problems have occured when archiving an image file.
Procedure: Check whether enough free memory is available and if required, increase it and/or scan the image document with a lower resolution (dpi).

Please state destination directory:
Error: During installation a directory for copying to was not entered.
Procedure: Reenter command with destination directory.

Date fields only permitted for deadline calculation:
Error: A date field was defined as result field within the calculation definition

without the calculation taking place with a deadline field.
Procedure: Call "Settings/calculation definition..." and correct the entry. If a date field is a result field, one of the two calculation fields must be a deadline field.

File data.bmp does not exist:
Error: When transferring data, document pages were also applied. But the selected template does not include a variable for importing documents.
Procedure: To import documents, the template must have the variables **graphics** at the required position. Insert manually or automatically with the key combination **Ctrl**+**Shift**+**0**.

File cannot be opened:
Error: May occur, e.g. after OCR with third-party application, if the file was not placed in the local working directory.
Procedure: Archive the file manually: Call the "document/new" command and find the file in the directory where it was placed. The directory and the file name, which Dr.DOC® requires for automatic archiving, is in the header of the new record dialogue.

Record locked:
Error: A record was not closed properly and is now locked for editing.
Procedure: Call the "release record lock" option in "management/reorganise archive".

Dbase file ...dbf cannot be opened:

Error: When importing dbasedata, a file was entered that the program cannot find.

Procedure: Check entry and correct.

The fields of this dbase file are incompatible with the import selection:

Error: The message may be displayed during dbase import.

Procedure: Check all fields of the archive and the dbase file for identical data types and field types. For some earlier dbase versions the message may be a result of memo-fields that cannot be imported. In this case try to load the dbase file into another program. If this is possible (incl. memofields), save it as ASCII or ANSI file and import it into the archive with ASCII/ANSI import. If this does not work, you can import all fields except for the memo fields.

Duplications not permitted:

Error: An input duplicates check was defined to be carried out. Entries were made, which are already in an existing record or a record was duplicated.

Procedure: Change entry, check and change field selection for input duplication check if required or determine that a duplication check is not to be carried out.

Entries in the record do not correspond to the Thesaurus default:

Error: An entry was made manually in a field, which does not exist in the Thesaurus. The message will only be displayed, if the "check automatically with Thesaurus" option is activatedin "Settings/Thesaurus definition...".

Procedure: If you do not know which entries are permitted by the Thesaurus, enter * in the corresponding field and activate the "Thesaurus" command.

More than .. characters were selected:

Error: There was no character number entered in "select list" or "print tables" or it was too large.

Procedure: Check entry: a maximum of 253 characters including blanks between the columns are permitted.

Incorrect data type or format error:

Error: Entry does not correspond in a certain field with preset of the data type as date or digit.

Procedure: Check entry and correct. If error message is shown repeatedly, check whether an automatic fieldentry does not correspond to a data type setting.

Error in scanner parameter:

Error: The selected setting in the scanner setup is incompatible with the scanner.

Procedure: The message may occur, if "paper format A4, landscape" is selected for an A4 scanner. Some scanner drivers also produce this message, if there is not enough memory for the selected setting incl. resolution.

Error in field selection:

Error: An error occured in field numbering in sort field selection or print field selection.

Procedure: Check entry. Ensure that the fields are numbered consecutively if several tabs exist.

Scanning error:

Error: Importing image documents via a scanner was attempted without a correct connection to the scanner.

Procedure: Check scanner connection.

Error when saving - please check paths:

Error: When setting up or changing an archive, incorrect or non-existing directory paths were entered.
Procedure: Check entry. If required, check whether the stated directories really exist.

Field ... on page ... is a date field:

Error: A field with data type date was filled in an input mask. There is an entry in this field that does not correspond to this data type.
Procedure: Check entry and correct. Refer to the various valid entry options for dates in the DATA TYPE chapter.
The error may also occur, if a date field is defined as result field of a normal calculation (date field only possible for deadline calculation).

No bar code found .. for section frame:

Error: Bar code recognition is activated, but no suitable frame available.
Procedure: The frame may be too small - set it again generously and try again.

No Thesaurus stated for this field:

Error: The Thesaurus command was selected in edit or new entry mode. The cursor is in a field, for which no Thesaurus is defined.
Procedure: To apply Thesaurus entries, the path and name as well as the connection fields and import fields must be stated in the field concerned in "Settings/Thesaurus definition...". Please refer to the CREATE THESAURUS chapter.

Help *path/name* could not be started:

Error: Several possibilities:
1. The program was started without the standard help being available in the path with subdirectory \HELP stated at installation. No other help was stated when the archive was started.
2. The program was started stating a help file which is unavailable.
Procedure: Dr.DOC® always tries to start the standard help in the path with subdirectory \HELP stated at installation. Exception: The archive was called together with a special help file.

Check whether if using standard help, it is in the path with subdirectory \HELP stated at installation and install again if required (from the installation disk; do not copy from other directories!). Or: Call the program according to the notes in chapter 8.1 START with a certain help file.
Be aware that new help files are only created via "Select help", as path details are incorrectly applied with other copying options!

Your network licence is only valid for ... user:

Error: An attempt was made to call the program at different workstations by more users than permitted at the same time.
Procedure: The maximum number of users permitted for your program licence at the same time is included under "Help/About Dr.DOC®".

Thesaurus entry for field ... not found:

Error: "autoadopt" from the Thesaurus is defined for one or several fields. When the record was saved, the program could not find a suitable entry.
Procedure: Check entries in the corresponding fields. Important: "No entry" is regarded as "incorrect entry"!

Form could not be opened:

Error: The program tries to find a form, which is not yet activated.
Procedure: Select the "select form" command from the "Settings" menu to activate the required form.

Cannot open *path*\document.*ext*:

Error: The "documents" command was activated and the third-party application was started with the document. This document was not closed. For the next record, in which a document is to be called with the same third-party application, this error message will be shown.

Procedure: Documents are always called as document.*ext* when calling via a third-party application (*ext* stands for the respective extension defined for the program). This file must first be closed, if another document is to be called with this third-party application. Change to the third-party application with **ALT**+**TAB** (in Dr.DOC® you remain in edit-view) and close the file (the program itself does not have to be terminated).

Cannot open source file (import):

Error: When importing an ASCII/ANSI file, a file was stated which the program cannot find.

Procedure: Check entry and correct.

No memory:

Error: The OCR processing could not be executed.

Procedure: This message may be displayed after attempted OCR processing and means that the OCR software could not read anything. Change the settings and try again.

Password incorrect:

Error: An incorrect password or one that does not belong to the currently displayed user was entered in user login.

Procedure: The password entry is shown encrypted on screen. Delete the incorrect entry, then try again. Ensure you match case.

Search term not found:

Error: A term was searched with the search functions, which does not exist in the data or errors occured when logical associations or marginal data was entered.

Procedure: Check entry and correct if required. Check the match case option if required.

Thesaurus entry not unique:

Error: The "check Thesaurus" and "Autoadopt from Thesaurus" options are activated. Nothing or an ambiguous search term was entered in a field, which is linked to a Thesaurus.

Procedure: If "Autoadopt from Thesaurus" is to take place, the previous entry in the field must be clearly allocated to one single Thesaurus entry.

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FINALLY

"Extensions"

There are various "extensions" of Dr.DOC®:

Dr.DOC® E Single user version for managing any number of documents per archive

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Additional module

C-programming interface for users, who themselves want to make further developments on the basis of Dr.DOC® .

Service

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